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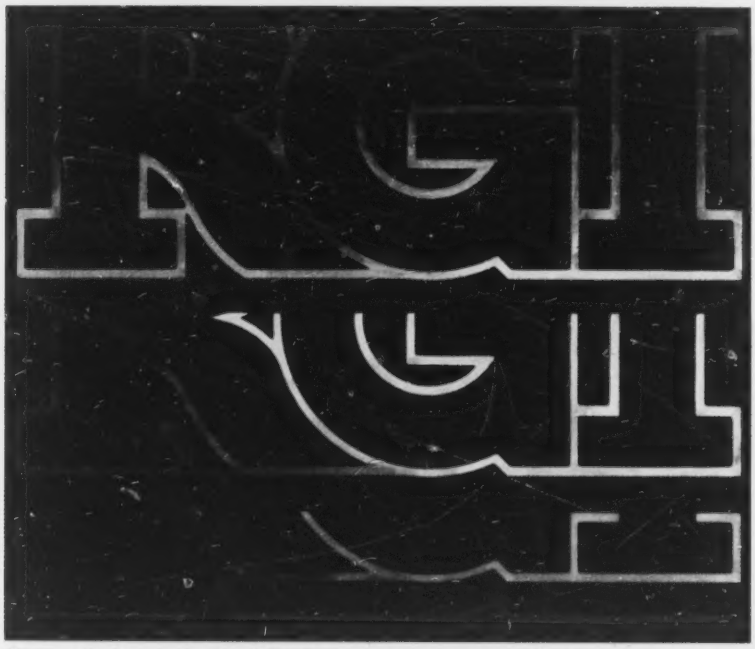

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MENU IDEAS

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Assisted by Kathy Seibert

17th Annual Restaurant Growth Index

The 17th Annual Restaurant Growth Index (RGI) is our exclusive analysis of the foodservice industry published each September. It begins with a comprehensive report of the important trends including sales, purchase, and real growth data in eight major market segments—separate eating and drinking places, hotel/motel, transportation, leisure, retail, business and industry, student and health care—and 38 sub-market segments. Following this study on page 178 is our statistical profile of the nation's 315 metropolitan areas and 211 ADIs.

In this year's edition of the Restaurant Growth Index (RGI), we provide hard data for 1982, best estimates for 1983 (the last full year), and a five year projection to 1988 for planning purposes.

This year, we are receiving the benefit of preliminary results from the 1982 Census of Retail Trade. Not all market segments have been released yet, but we have made revisions in our data to conform to the Census data. There will be further revisions next year when final reports are issued for all segments and merchandise line percents are refined by the issuance of actual dollar volume figures.

We have made revisions to full menu restaurants, limited menu restaurants, drinking places, hotels/motels (very preliminary data for the whole category was available which raised the sales figure by 3.4 percent annually for 1977-1982 so we made preliminary adjustments which will be revised by category when the final report is issued), bowling lanes, variety and general stores, gasoline service stations (in other specialized retail stores), drug and proprietary stores. In reviewing the estimates for 1982 versus 1977, we are quite pleased with the results. We were only 1.77 percent per year off for full menu restaurants and only 0.8 percent per year low for limited menu restaurants. We were 1.99 percent per year too high for drug and proprietary stores. Variety and general was off substantially, being too high by 6.2 percent. The merchandise line proportion declined from 4.5 percent to 3.1 percent, a 31.1 percent decline.

Foodservice sales in 1983 increased 7.8 percent to a total of 150 billion. This is a conservative figure as it does not include a commercial equivalent dollar volume for military feeding (troop feeding) or school foodservice (we count as actual sales only cash paid by the students); and it does not include vended can soft drinks, bottled soft drinks or vended candy. We show only food and beverage (alcoholic and non-alcoholic) sales for establishments with payroll only. In separate eating places, we are 3.8 percent below the maximum possible if we include all sales including tobacco and establishments without payroll.

If we adjust our figures to reflect the higher values generated by the addition of military and school foodservice commercial equivalents and the additional volume in vending categories not originally included, we would show industry sales $17.2 billion higher, for a new total of $167.7 billion. This total is 11.4 percent higher than our basic estimates.

In our view, these adjustments are not valid because they produce a result which is in turn inflated (military and school feeding), and not comparable (candy sales are not included in the Census of Retail Trade's merchandise line for meals and snacks or alcoholic beverages). In the case of can and bottle soft drinks through vending machines, they are sold through a restricted

Foodservice Industry Summary

	1982 Sales ($000,000)	1982 Purchases* ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales Growth ($000,000)	% Compound Annual Growth Nominal	% Compound Annual Growth Real
	139,660	59,421	6.4	150,500	63,590	7.8	215,726	7.5	2.8
	119,214	46,019	6.6	129,657	49,850	8.8	187,782	7.7	3.0
	19,732	11,362	5.6	20,843	11,645	5.6	26,897	5.2	0.7
	714	2,040	7.5	772	2,095	8.2	1,047	6.3	1.7
	93,232	33,093	7.5	101,688	36,085	9.1	148,241	7.8	3.2
	85,330	30,259	7.8	93,351	33,095	9.4	138,254	8.2	3.5
	45,436	16,487	6.9	49,422	17,933	8.8	69,984	7.2	2.6
	35,142	12,121	9.4	38,832	13,394	10.5	61,214	9.5	4.8
	8,632	2,830	2.2	9,359	3,068	8.4	13,076	6.9	2.3
	2,073	906	5.4	2,306	1,008	11.2	3,515	8.8	4.1
	2,850	1,030	6.0	3,059	1,103	7.3	4,400	7.5	2.9
	3,956	1,417	4.4	4,228	1,514	6.9	6,246	8.1	3.4
	7,875	8,632	-1.1	8,343	9,037	5.9	11,189	6.0	1.5
	7,374	4,803	8.0	7,836	4,705	6.3	9,410	3.7	-0.8
	11,335	5,497	6.6	11,963	5,798	5.5	16,157	6.2	1.6

** Purchases include all food, nonalcoholic, and alcoholic beverages (does not include equipment or supplies).*
*** Sales data based on post exchanges and clubs; purchase data based on post exchanges, clubs & troop feeding.*

Note: Full menu restaurant and limited menu restaurant sales are included in eating place sales. Eating place sales in turn are included in eating and drinking place sales and should not be added with other major market segments to arrive at total market sales.

wholesale distribution network.

For 1988, we project foodservice sales of $215.7 billion, the first time over $200 billion. This is a gain of $65.2 billion for the five year period. This is a compound annual growth of 7.47 percent or a total growth of 43.34 percent.

Real growth will account for 34.5 percent of the total gain or $22.5 billion. This is roughly comparable to the 1982-1987 period. Actually, we are doing better because the gains of 1983 were very strong because of the very weak 1982 results.

We are still faced with a situation where 65.5 percent of sales gains are eaten up in inflation. This, in spite of a moderation in menu inflation of 0.67 points from the 1982-87 period.

It doesn't appear very likely that inflation will come down very much from the 1983-1988 estimate of 4.51 percent for menu prices. Thus, inflation, which is a great thief, is now at a base level. But, it has not stabilized at a point where there are enough increases to offset mistakes.

As the inflation rate stabilizes, the nominal rate is greatly reduced. This year's forecast 1983-1988 of nominal growth at 7.5 percent is 0.8 percentage points lower than last year while real growth at 2.8 percent is only 0.2 points lower than last year's 1982-1987 forecast.

The basic demand for eating away from home in spite of declining value versus at home eating is still unsatisfied. Longitudinal studies done for the National Restaurant Association by the Gallup organization still find that the customer traffic would rise by about one-third if people could eat out as often as they liked. The deterring factor was lack of money. Because of increasing commitment to homes and cars and other high ticket items, the installment and mortgage debt monthly charges are up and have had a negative impact on dinner houses in the $10 per person price range.

Fast food restaurants have been the beneficiaries of the diverted traffic. With people feeling better because they have a job and think they will have one for a while, the fast food traffic frequency has risen.

Industry Real Growth Summary

	1982 Real Growth Rate	1983 Real Growth Rate	1983-1988* Real Compound Annual Growth
Total Market	1.2	3.6	2.8
Commercial/Contract	1.3	4.2	3.0
Institutional/Internal	0.4	0.6	0.7
Military	2.2	3.8	1.7
MAJOR MARKET SEGMENTS: Eating/Drinking Places	2.2	4.7	3.2
Eating Places	2.5	5.0	3.5
Full Menu Restaurants & Lunchrooms	1.6	4.4	2.6
Limited Menu Restaurants	4.1	6.1	4.8
Hotel/Motel Market	-3.1	4.0	2.3
Transportation Market	4.0	6.8	4.1
Leisure Market	0.7	2.9	2.9
Retail Market	-0.9	2.5	3.4
Business/Industrial Market	-6.2	2.0	1.5
Student Market	-2.8	-2.0	-0.8
Health Care Market	3.6	1.6	1.6

Real personal income will grow at a compound annual rate of 2.6 percent for the time period 1983-1988. We have set eating place sales gain (real) at 3.5 percent, which is 0.9 points higher than the gain in income. This is the same basic level as last year, and is an optimistic view.

The market will be more fragmented with operators looking for niches which at the moment center around limited menu adult restaurants with alcohol and a check average not over $6.50 per person. This is a result of the demographic shift to an older customer and a great need and demand for convenience. Take-out has expanded, particularly the neighborhood gourmet take-out.

Since incomes are not expanding at a rapid pace, value will be even more important to the customer.

The marketing focus has stayed on meal periods and new items to stimulate traffic.

Regional variations in performance will increase. When we get the 1982 Census of Retail Trade final data, we will analyze those differences. It seems likely that some areas which have been hard hit economically will bottom out and rebound, but not as vigorously as the rest of the country.

In summary, the commercial/contract component of the foodservice industry will grow at a 3.0 percent real rate, down from 3.5 percent for 1982-1987 due to a reduced gain in real income, and a moderate growth in manufacturing. The institutional/internal group will grow slowly at 0.7 percent, which is an improvement from 0.4 percent due to increasing enrollment at schools and a lessening in the rate of decline in participation in school lunch as the main decreases have nearly worked their way through the system. □

This summary was prepared by RBI Research and Malcolm M. Knapp, president of Malcolm M. Knapp, Inc., New York. The 1982 sales and purchases data used in this eight major market and 38 sub market growth report were prepared by Mr. Knapp under contract with the National Restaurant Association. Estimates for 1983, and projections to 1988 were prepared specifically for Restaurant Business Magazine.

Separate Eating & Drinking Places

Operators in the separate eating and drinking place segment seem to be unrelentingly optimistic. Chains and independents alike are opening new units, launching new concepts, and in some cases increasing franchising. All the while, they are continuing efforts to increase customer counts.

This has been a year of stepped-up acquisitions, with large foodservice companies buying smaller foodservice firms to diversify and broaden their market bases, unlike past periods of acquisition when non-related conglomerates bought into the business in a big way, or foodservice giants bought other foodservice giants.

Fast food

Because grown-up baby boomers' tastes have matured, they demand pleasant surroundings when they eat out. As a result, the trend to eschew utilitarian plastic and to upgrade fast food decor continues. Wendy's recently announced the addition of greenhouse extensions to 200 company-owned units. Burger King also continues its general upgrading, using more natural woods, natural tile floors, and brass accessories.

Del Taco Corp., part of W.R. Grace's fast food division, is converting units to a Del Taco Mexican Cafe concept. Atmosphere is now more similar to a family restaurant than to a typical fast food unit.

Along with upgraded decor come upgraded, expanded menus and emphasis on additional day-parts. At Del Taco, that means dinner platters with rice and beans to build evening business, as well as a Mexican breakfast for morning business.

The hamburger giants, too, are emphasizing expanded menus and additional day-parts. Wendy's, of course, made history with its rollout this year of stuffed baked potatoes and now sells 600,000 potatoes a day—making it the largest restaurant purveyor of baked potatoes in the world. Wendy's also will begin serving breakfast in 1,500 of its 2,800 units by the end of this year.

Burger King, too, continues to experiment with breakfast, with the croissant sandwich the leading contender for eventual chainwide rollout. Arby's rolled out a croissant breakfast early in 1984.

An important trend emerging among burger restaurants is the introduction of late-night hours for drive-through windows. Both Wendy's and Burger King are closing dining room service but continuing to operate drive-through windows until 3 or 4 a.m. in appropriate markets.

Nutrition continues to be an important issue throughout the segment. As new chains like D'Lites emerge to cater to the diet-conscious, fast food giants market their salad bars. Wendy's is even testing a "Light Side" menu, which includes tuna salad with tomato wedges, cottage cheese salad with tomato wedges, and the option of a wheat bun with any sandwich.

Taco Bell this year introduced its Taco Lite to appeal to the weight-conscious, and both Carl's Jr., and McDonald's offer booklets showing nutritional breakdowns and offering tips on good nutrition.

As far as expansion, a generally favorable economic climate has caused an increase in new unit openings. Wendy's plans to open 4,000 units (275 this year, 350 next year, and 400 each year thereafter) by 1988. And, as a result of its first franchising program, Carl's Jr. is expanding into new markets from its Southern California stronghold, planning to add over 100 units in the next two years.

Burger King is pursuing a policy of penetrating unconventional locations. The company recently landed an exclusive franchise to open units on U.S. Army and Air Force bases around the world. Other unusual franchisees include F.W. Woolworth and Howard Johnson's, which is opening Burger Kings along turnpikes.

A significant trend in the fast food sub-segment is the proliferation of a variety of concepts. Infant chains such as Minneapolis-based Nankin Express, Denver-based Tokyo Bowl, San Antonio-based Quick Wok, and Miami-based Teriyaki USA (owned by Benihana) are testing the customer's appreciation of Oriental food. All are planning aggressive expansion, and Nankin Express recently signed giant International Multifoods, operator of 950-unit Mr. Donut, as a franchisee with development rights for the eastern U.S. and Japan.

Other new fast food concepts are Denny's El Pollo Loco, serving marinated, grilled chicken; and the Fresher Cooker, serving freshly prepared foods including pasta, sandwiches, soups, salads, and vegetables. R.J. Reynolds Development Corp. recently signed an agreement to open some 225 Fresher Cooker

Victoria Station's new concept, Bonkers, is the chain's entry in the growing gourmet burger segment.

1982: $93,232,000,000 + 7.5% Sales Growth | 1983: $101,688,000,000 + 9.1% Sales Growth

1988: $148,241,000,000 + 7.8% Compound Annual Sales Growth

Separate Eating and Drinking Places

	1982 Sales ($000,000)	1982 Purchases ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales ($000,000)	1983-1988 % Compound Annual Growth: Nominal	1983-1988 % Compound Annual Growth: Real
Separate Eating Places	85,330	30,259	7.8	93,351	33,095	9.4	138,254	8.2	3.5
Full Menu Restaurants & Lunch Rooms	45,436	16,487	6.9	49,422	17,933	8.8	69,984	7.2	2.6
Limited Menu Restaurants	35,142	12,121	9.4	38,832	13,394	10.5	61,214	9.5	4.8
Public Cafeterias	2,413	884	4.2	2,589	948	7.3	3,582	6.7	2.1
Social Caterers	814	307	1.0	837	316	2.8	936	2.3	-2.1
Ice Cream, Frozen Custard Stands	1,525	460	7.4	1,671	504	9.6	2,535	8.7	4.0
Bars & Taverns	7,902	2,834	5.0	8,337	2,990	5.5	9,987	3.7	-0.8
Total	93,232	33,093	7.5	101,688	36,085	9.1	148,241	7.8	3.2

Seattle-based Flakey Jakes (below) promotes freshly ground beef on-premise. The Sea Grill at Rockefeller Center is part of a new complex of restaurants opened recently by Restaurant Associates.

units over the next 10 years.

Mid-price and family restaurants

Long the province of coffee shop chains, budget steakhouses, and small family restaurants, this segment has been buffeted as consumer tastes have changed. Now the sector is seeing almost incredible activity. Some of the industry's hottest new concepts—in the eyes of both the public and Wall Street—are vying for attention.

A new kind of restaurant is trying to combine salient characteristics of both fast food and theme restaurants, thus carving out a new market niche between the two. Loosely grouped as "gourmet burger" concepts, the restaurants offer fast service and a low check average (usually about $5) with the kind of atmosphere more characteristic of a theme restaurant, full liquor service, and high food quality, all leading to a customer perception of a good price/value relationship.

Everybody, it seems, wants in on the action. Pillsbury, owner of Burger King, has introduced J.J. Muggs. Saga Corp. acquired five-unit Spoons last August. Diversifoods, operator of Chart House, Godfather's Pizza and Luther's, and a major Burger King franchisee, has Moxie's. Pizza Inn is expanding J.T. McCord's. Victoria Station has opened Bonkers. Sea Galley Inns has Flakey Jake's. New York City-based Beefsteak Charlie's is converting some of its units to a concept called Daly's Dandelion; and Magic Pan is expanding its offering, Laredo's. Greyhound Corp. recently announced plans to expand a concept called T. Twiggs.

Independent chains are proliferating as well. National attention first focused on the phenomenon when Norman Brinker, then president of Pillsbury's restaurant group, left his post to take over Chili's. Another company, much-copied Dallas-based Fuddrucker's, is holding its own against all comers, and Bojangles' (upscale chicken) co-founder Richard Thomas has opened R. Thomas Hamburger Cafe with the intention of expanding.

Offering broader menus but tapping the same market for the same reasons are T.J. Applebee's, operated by W.R. Grace's fast food division; and Ed Debevic's Short Order Deluxe, a joint venture between Collins Foods, Phoenix-based Big Four Restaurants, and Chicago-based Lettuce Entertain You Enterprises.

On the surface they couldn't seem more different, but today's popular "country" or "down home" concepts are expanding for some of the same reasons as gourmet burger restaurants.

"Our research showed us that people are 'eating out' more and 'dining out' less," says Dave

Grady's Good Times, in Knoxville, has combined major menu trends popularized by many of the nation's theme restaurants.

McKenzie, vice president of Southern Hospitality, which this year launched a home-cooking concept called Southern Cooker. "They are looking for good food at a good price, and there was really a whole market niche not being served."

Southern Cooker offers a broad menu of light entrees, sandwiches, and specialties including barbecued chicken, chicken—fried steak, pot roast, meat loaf, and catfish, each served with rolls, cornbread, and a choice of two vegetables from a long list. Highest price is $5.95 for marinated strip steak.

All of these "gourmet burger" and "down home" concepts emphasize fresh, high quality food.

Gilbert/Robinson, operator of Houlihan's, Bristol Bar & Grill, and Fedora, is also testing a new country concept in St. Louis called Lucille's Country DinnerHouse. Opened this July, the restaurant features generous family-style portions of favorites like fried chicken, green beans, biscuits, fresh-whipped potatoes, and peach cobbler.

Po Folks continues to expand with its country-style decor and family-style menus, opening its 100th unit recently, while two-unit Zackly's in Tampa, Florida, is eager to expand. Other chains in the family segment are Jimmy Dean Restaurants and Bob Evans Farms, both based in Ohio.

Related to the popularity of "country cooking" is the popularity of barbecue concepts, which are expanding outside their southern base. The leader is Diversifood's Luther's, with 56 units currently open and plans for 90 openings this year, most in the latter half.

Pizza, of course, has long been a popular mid-price staple. The big news in this segment is the emergence of lunch as a significant daypart and the popularity of delivery.

Giant Pizza Hut spurred the popularity of pizza as a lunch food with the introduction of its personal pan pizza a year and a half ago, supported by massive advertising. Where the leader goes, others follow, and a number of chains have since added luncheon pizzas.

Domino's focused attention on the profitability of pizza delivery, and since then a number of operators—including Mr. Gatti's, Pizza Hut, Pizza Inn, and Godfather's—are either testing home delivery or have already introduced the service.

A new twist on home delivery is the computerized service of Pantera's Pizza, with 56 units primarily in the St. Louis area. The company is readying a centralized, computerized order system. Any St. Louis customer can call a single number, where operators will be waiting to encode orders into a computer, to be printed out at the unit closest to the customer's home. Other U.S. pizza chains are testing this computerized delivery service, which was pioneered by a pizza chain in Toronto called Pizza Pizza Ltd.

As the consumer has become increasingly nutrition-conscious over the years, a number of mid-price salad-only or soup-and-salad concepts have emerged but never established an appreciable presence in the market. Saladalley, with five units in Philadelphia, hopes to be the first.

At Saladalley, customers are shown to the table and give orders to a waitress, then help themselves to a massive salad bar featuring 40 items. Soups, running the gamut from old favorites to the exotic, include African peanut chicken, German lentil sausage, and Korean sesame beef.

Tables turn on the average of every 35 minutes, and average check is about $5. Units average $500,000 in annual sales, and customers are 60 percent female, says chairman of the board Steve Byer.

Some old-timers in this segment are sprucing up for serious competition. Among themz are Howard Johnson's and Ground Round. By the end of the year, about half the 225 Ground Rounds will have a lighter, brighter look with a stand-

Gourmet burger restaurants are carving a new market niche, and it seems every one wants in on the action.

up bar and a broader menu with more salads, Mexican entrees, and pasta. Some 700 Howard Johnson's also have a new all-day menu.

Casual theme restaurants

Noisy, crowded theme restaurants serving eclectic menus are still very much in style, though there's a quiet move toward toning down the trendiness and offering more classic, sophisticated surroundings and menus—without raising prices.

Operators continue to revamp lackluster units to bring them into this category. For example, Howard Johnson's is converting some of its units to concepts called Bumbershoots and Pickle Lilly's. Bumbershoot's, opened last August in Framingham, Massachusetts, is a radical departure from a typical Howard Johnson's with a large stand-up bar, a raw bar, lots of light woods and bright fabrics, and a display of fresh produce as the customer walks in the door. Pickle Lilly's is also upbeat and bright, with a menu featuring lots of finger foods, burgers, and Mexican food.

A restaurant that epitomizes many of the food trends showing up in theme restaurants is Grady's Good Times in Knoxville, Tennessee, owned by the Regas family.

"Extras and snacks" include nachos, chips, and several Mexican dips, stuffed baked potatoes, croissants, and more. Seven salads with homemade dressings are complemented by pasta, quiche, burgers (ground fresh daily and broiled over oak and hickory charcoal), and several steak, fish, ribs, and chicken selections, many of them grilled.

One big problem mars the bright outlook for theme restaurants: the public's concerns over drunk driving. Casual theme restaurants traditionally have derived much of their profit from liquor sales, and many have aggressively promoted drinking with happy hours and two-for-one promotions.

Now, forward-looking operators are considering how they can responsibly approach the problem of drinking and driving. For instance, all Gilbert/Robinson restaurants now place a poster in a prominent place with a message urging friends to call taxis for inebriated guests.

Bartenders also are supplied with cards to hand discretely to customers, avoiding embarrassing confrontations. The cards say: "Dear customer, your safety is our concern. We feel you've had enough to drink and we cannot serve you another. Please accept a complimentary non-alcholic beverage or something to eat. Be a life saver. Don't drive intoxicated and kill yourself. WE WILL BE HAPPY TO CALL YOU A CAB. We want to see you again. Thank you for not driving under the influence of alcohol."

In a similar vein, Bennigan's has substituted a drink token for a second drink during happy hour, and TGI Friday's is actively lobbying for raising the national drinking age to 21. The company is continuing its efforts to shake a singles bar image with the introduction of Dalt's, a '40s-style bar-and-grill concept with the bar de-emphasized.

Upscale restaurants

Today's customer is ready to take chances, to experiment, to embrace and even to invent new kinds of cuisine. As a result, upscale restaurants are thriving in the U.S., and "The New American Cuisine," as it has been dubbed, is making American chefs celebrities.

This cuisine grew out of France's radical Nouvelle Cuisine, which was adapted by newly confident American chefs who started emphasizing indigenous products, trying out new combinations of ingredients, lightly cooking fish and vegetables, lightening sauces, and stressing the quality of raw materials and beauty of presentation.

Sometimes "The New American Cuisine" emphasizes traditional, newly stylish American regional recipes (Creole, Cajun, barbecue, Southwestern, New England). An example of a company drawing upon both kinds of American cuisine—the traditional and the new—is Restaurant Associates at its $26 million restaurant complex in New York City's Rockefeller Center.

The posh Sea Grill, the American Festival Cafe, and a coffee-shop-plus carry-out called Savories all serve a variety of entrees drawing upon American ingredients and tradition.

The theme is carried out most fully in the American Festival Cafe, where a year of negotiations with the Museum of American Folk Art allowed Restaurant Associates to display a variety of folk art treasures.

Menu selections in the three restaurants range from cold corn-and-crab soup, seafood chowder, and Florida Key Lime pie to buttermilk-fried baby chicken, salamagundi salad, barbecued ribs, and sopa de tortilla.

But American cuisine isn't the only news in upscale restaurants. The explosion of concepts devoted almost entirely to seafood continues. Benihana of Tokyo recently announced a joint venture agreement to build the first "Big Splash" retail outlet/restaurant in North Miami Beach. The restaurant will accommodate over 300 diners, cost about $1.6 million to build, and command check averages between $15 and $20 per person.

Also popular are upscale ethnic eateries, particularly Oriental, Mexican, and Italian. Now, something called "La Nouvelle Cuisine Franco-Japonaise" is emerging out of California, with Los Angeles' La Petite Chaya exemplary. Celebrity chef Wolfgang Puck's newest restaurant, Chinois on Main in Santa Monica, also offers a sophisticated California/Chinese/French menu served from the display kitchen which is in itself an important design trend in theme and upscale restaurants around the country.

Chicago's Spiaggia, a Levy Organization restaurant, is an example of the very sophisticated Italian restaurants popular with upscale customers. Oak Street Beach and Lake Michigan are viewed through Spiaggia's 34-ft.-high windows that dominate the decor. The menu includes such specialties as porcini mushroom soup under puff pastry, spinach souffle lasagna, and scallion fettucini with smoked salmon.

—Jacque Kochak

The Hotel/Motel Market

The Barclay Terrace at the Inter-Continental in New York City.

Neglected in the past in favor of the seemingly recession-proof carriage trade, the mid-priced segment of the hotel industry is yielding some interesting new concepts.

Further, the robust activity in the largest segment of the lodging sector helps galvanize the hospitality industry as a whole to move out of the economic doldrums it has been experiencing. Sales growth registered a healthy 8.4 percent increase for 1983 compared with 1982.

According to Daniel R. Lee, vice president-research at Drexel, Burnham, Lambert Inc. (a New York-based investment banking firm), the lodging demand has absorbed the backlog. In a recent research report covering Hilton, Holiday Inns, Marriott and Ramada, Lee writes: "At this point, we believe lodging demand . . . is poised for a full-fledged, cyclical recovery. Occupancies, after declining for nearly four years, should begin showing strong upward trends."

Much of the action occurs in the mid-priced segment, the largest by far in the industry. Indeed, of the 2.5 million hotel rooms in the U.S. today, 1.25 million rooms comprise the mid-price market. Competition is, not surprisingly, fierce.

Illustrative of the intense jockeying for position are the recent moves by Marriott, Howard Johnson's and Holiday Inns to tap a larger portion of this undeniably lucrative market. All are seeking to capture the front running position with the introduction of new hotel "products."

Marriott, which has registered the industry's most aggressive growth

with a 20 percent increase in guest rooms per year over the last five years, describes its new concept as "solidly in the heart of the moderate segment." The Courtyard by Marriott is targeted to extend Marriott's influence in the lodging industry by allowing the chain to move into areas that could not support a traditional Marriott hotel—a property including several restaurants, a variety of lounges and amenities such as pools, health clubs and meeting facilities. The smaller Courtyards (130 to 150 rooms) charge moderate room rates ($35 to $55 daily) to support a unit which features limited meeting rooms, one 40-seat restaurant (no room service), and a small lobby lounge.

According to Craig Lambert, vice president of marketing and sales for the new division, there are currently five Courtyards operating in Georgia. Ambitious expansion plans call for 20 to 30 units to open by the end of 1985 (primarily in the Northeast corridor) and a minimum of 300 units by the early 1990s.

The company is not worried that the Courtyard—which Lambert describes as a "suburban" property—will cannibalize business from its traditional hotels. In fact, Lambert points out that the chain purposely built the Courtyards in Atlanta in close proximity to Marriott hotels.

In a move designed to create another vehicle for growth in the moderate segment it once dominated, the Howard Johnson Company will expand with its new line of properties called Plaza-Hotels. According to Manuel Ferris, president of the new division, these "full service" properties will complement the road-side motor inns which are the core group for the chain. Similar to Marriott Courtyard properties, Howard Johnson's mid-priced, full service hotels include only one restaurant and one lounge. (The single restaurant is described as "first class but not gourmet.") However, unlike the Courtyard by Marriott the Plaza-Hotels do provide sizable meeting and convention facilities as well as separate "Executive Sections."

Properties will be located in city centers and airports. Their moderate rates ($40 to $60) are targeted to attract business travelers.

Marriott's Courtyard (below) is the chain's entry in the mid-priced sector. The Fifth Season (r.), one of three restaurants at the Amfac Hotel in Minneapolis.

There are three units now open and three properties scheduled to open in the near future. Within five years there will be 70 to 90 hotels in the new group—30 to 40 of the hotels will be company owned and an additional 30 to 40 will be offered to existing licensees.

Holiday Inns Inc., the largest lodging chain, is, according to investment banking analyst Lee, adopting a "Procter & Gamble" approach to the hotel business. Indeed, as the traditional Holiday Inn system nears saturation in this country, it is successfully developing separate chains to encompass both the high (Embassy Suites) and low (Hampton Inn) ends of the business while extending its influence in the mid-priced segment (the core Holiday Inn hotels). Its Crowne Plaza hotels operate at the upper end of the mid-price scale.

Accordingly, the company has changed its philosophical and operational stance by shifting from a strong centralized staff function to a decentralized field.

According to Tim Craig, director of food and beverage development for the 143 company-owned/operated properties, the Memphis home office will offer strong support in terms of menu and promotional development and will provide a master recipe file. However, local management will be responsible for evaluating, identifying and defining food and beverage opportunities that will be successful in each locale. Craig sees Holiday Inns' properties following significant restaurant trends but refining and modifying them to yield the greatest guest satisfaction.

As part of this decentralization, the Pipers restaurant concept is being phased out. "You can't force feed a cookie cutter restaurant down people's throats from Memphis to Atlanta," he emphasizes. While he admits that a key to the chain's success has been of standardization in rooms, "the same person who applauds standardization of rooms does not like it in foodservice."

The company's 10 Crowne Plaza properties attract the business traveler with additional amenities such as two restaurants. Explains Franz Viertbauer, director of food and beverage for Crowne Plaza hotels: "In each hotel there are two restaurants. The first is a cafe/bistro, a multipurpose restaurant. The second is a signature operation which offers a fine dining experience."

These upscale restaurants incorporate local influences. For exam-

ple, in Los Angeles, the fine dining room combines California cuisine with nouvelle overtones while the Miami signature restaurants reflects the South American influence.

One of the newest ventures of Holiday Inns is the Hampton Inn concept, targeted to attract the budget minded consumer. There are no restaurants at these properties (the first of which opened in August) and as a result Hampton Inns are located near to at least two freestanding restaurants. (One of which may be a Perkins restaurant—another subsidiary of Holiday Inns Inc.)

While these chains battle for a larger segment of the mid-priced market, upscale hotel companies are involved in some belt tightening measures. Part of the problem lies in the disappointing performance of properties in overbuilt cities such as Houston, Boston and New Orleans. In addition, the soft economy did little to loosen tight corporate travel budgets.

According to Peter Hothorn, vice president of food and beverage for Inter-Continental Hotels, 1983 was a "rough and tumble" year. However, New York proved to be a strong performer.

At the Inter-Continental Hotel in Manhattan, the property's Barclay Terrace capitalized on the consumers' demand for healthy eating by featuring a "winning edge" menu. Developed by nutritionist Marina Polvay, the items on the menu were carefully balanced for high energy levels but low calories, cholesterol, sodium and fat. The menu includes a nutritional breakdown for concerned customers.

Amfac Hotels, a California-based chain known primarily for its resorts, opened its first property east of the Mississippi last November with the debut of a 606-room hotel in Minneapolis. The sleek property features three restaurants: Papaya's (popular priced), Gustino's (Northern Italian cuisine) and The Fifth Season (American cuisine).

"The restaurants here offer the guest a real alternative. In many hotels the restaurants compete with each other. In Minneapolis we provide three distinct dining experiences," explains Norm Rich, director of food and beverage.

While each of the restaurants features a different concept, Amfac is committed to the quality presentation of American foods. In fact, at the recent annual meeting of directors of food and beverage and executive chefs (dubbed "Great Expectations"), presentation of American cuisine was the focal point of the five day seminar.

American food and the presentation of fresh, indigenous ingredients tends to dominate hotel foodservice. Hilton International will open a new property in Kansas City at the end of the year. Like its hotels in New York and Washington D.C., the new Vista will feature a fine dining room where the accent is American. The Winston Plaza, a Stouffer Hotel, serves a selection of steaks, chops and seafood grilled over mesquite in its 86-seat The Quill restaurant. On the West Coast, executive chef Bradley Ogden at the Campton Place Hotel in San Francisco continues to emphasize fresh American ingredients.

The gaming industry is critical to the growth of many companies. Analysts estimate that 40 percent of Hilton and Holiday's revenues are derived from gaming while over 50 percent of Ramada's revenues are from gaming. It is not surprising to see explosive growth in Atlantic City.

The Golden Nugget, one of the most innovative (and most copied) casinos, sets the pace with "high roller" specials. Heavy betting regular customers are treated to complimentary meals, rooms, transportation and are invited to attend private parties hosted by celebrities.

The Sands Hotel recently intitiated a food court for gamblers anxious to eat quickly and return to the tables. Several popular restaurants from the New York, New Jersey and Philadelphia areas (Bookbinders, Nathan's Famous, Carnegie Deli) are included in the restaurant court.

Harrah's at Trump Plaza heralded the combined forces of estate magnate Donald Trump and Harrah's—the gaming division of Holiday Inns. Opened last May, the $220 million hotel features a 60,000 sq. ft. gaming floor. Public areas include seven restaurants and two casino cabarets. **—Denise M. Brennan**

Hotel/Motel Market: Foodservice Sales

1988: $13,076,000,000 + 6.9% Compound Annual Sales Growth

	1982 Sales ($000,000)	1982 Purchases ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales Growth ($000,000)	1983-1988 % Compound Annual Growth: Nominal	1983-1988 % Compound Annual Growth: Real
Hotels	5,944	1,934	4.2	6,437	2,094	8.3	***	***	***
Motor Hotels	1,032	337	2.0	1,120	366	8.5	***	***	***
Motels	1,656	559	-4.3	1,802	608	8.8	***	***	***
TOTAL	8,632	2,830	2.2	9,359	3,068	8.4	13,076	6.9	2.3

*** *There is not sufficient data to develop individual projections for these sub-market segments.*

The Retail Market

The excitement has been building over the past few years, but never before has there been as much enthusiasm among retailers over foodservice. Department stores now treat foodservice as a sales generator, a profit center—not the unavoidable but necessary convenience they have always had to provide to their customers. Convenience stores today see food as an underestimated opportunity that warrants attention, and many chains are upgrading their menu selections—particularly of fast food items—to compensate. Specialty shops crop up all over the country to supply a growing consumer need for variety and quality foodstuffs.

Foodservice sales among retail outlets in 1983 exceeded $4 billion. The overall market in retail foodservice grew at a rate of almost seven percent last year, coming off the previous year's growth rate of barely 4.5 percent.

From coast to coast, the retailing sector provides great opportunity for foodservice, and many are taking advantage of the positive trend.

Always the sales leader in the retail segment, department store foodservice knows no bounds in being innovative. "As an industry, we probably come up with more ideas than most," says Bob Jones, vice president of foodservice for Dallas-based Neiman-Marcus. "In fact, we probably do some things that restaurants follow us on, rather than vice versa."

Within the segment, department stores accounted for $1.2 billion in foodservice sales in 1983, more than any other retail subsegment. The segment's seven percent growth over the prior year is second only to the rising growth among convenience store chains.

Neiman-Marcus has been a driving force in retail foodservice for many years—its original Zodiac Room restaurant in Dallas is widely hailed as the first of its kind for fine dining in department stores. In the past year the chain has opened two new stores, in Chicago and Boston, and both offer foodservice. In the flagship Chicago Neiman-Marcus, along the Windy City's Miracle Mile, there are two eating places, the fine dining Zodiac Room and the quick service, take-out Fresh Market. Both, according to Jones, have been well received by the city's affluent residents.

"There are a lot of condominiums along the Miracle Mile, and that makes for a good many affluent, working customers—the types who look for quality and convenience," says Jones. "We're doing a lot of take-out business as a result." The Fresh Market offers prepared dinners and a large selection of salads.

Following a tradition begun in San Francisco, Neiman-Marcus's restaurant in Chicago frequently caters to private parties. In addition, merchandising techniques are consistently devised to fill the restaurant during non-peak hours, a common practice among retailers.

"In this business you've got to give the customer more than just good food and atmosphere," says Jones. "You've got to offer something extra." Some of the special events recently held in Chicago have been wine tastings and afternoon teas. In a less traditional technique, for three months an astrologer was featured in the dining room between 2:30 and 5:00 in the afternoon in order to attract diners at these off hours. The novelty worked, and the store will probably repeat the program this fall.

According to Stanley Finklestein of Macy's New York, the purpose of department store foodservice is a striving to mirror the image of the store itself. "If you're going to offer foodservice, it might as well fit into the overall feel of the store," he says. "Stores are becoming more sophisticated so restaurants must do the same." In Macy's Herald Square in New York, many floors have been redesigned recently, and foodservice operations have been revamped as a result. Recently, a French café was opened on the mezzanine level to service Macy's sophisticated customers. L'Etoile offers soups, salads, omelets, and desserts, as well as European coffees and wine. Breakfast, lunch and brunch are served, and an afternoon tea is offered at 4:30 p.m.

Neighboring Bloomingdales', a Federated Department Stores chain, is also changing with the times. Its Greenhouse counter-service concept has just been replaced by a more modern cafeteria. The move toward self-service, though unusual for Bloomingdale's, is thought to be a needed one for the tired Greenhouse concept. The new unit is art deco design and offers some of Bloomingdale's favorite menu items.

Sanger-Harris-Levys, another Federated chain based in Dallas, is offering what director of foodservice Richard Gussoni calls "current cuisine" to reflect far-reaching trends in the restaurant industry. Its Valley View store, in suburban Dallas, recently added a lavish foodservice unit called The Charcuterie. It features a display kitchen with a rotisserie for roasting seafood, meat and poultry, take-out service, and a dining room. With a separate entrance a and quality food, The Charcuterie, says Gussoni, can compete with restaurants in the area since it demands

a presence all its own.

"I have no doubt at all that good foodservice can be a great attraction to a department store," says Gussoni. "Our downtown Dallas Charcuterie is consistently listed as among the best places to eat in town. A study that Federated did shows that 23 percent of the downtown unit's total transactions were in the restaurant. I think that says something very profound about the opportunities for foodservice in this business."

John Lovelace of Dayton's in Minneapolis agrees that the retail industry's approach to foodservice must be driven by overall consumer trends. Dayton's opened an 8,500-square-foot multi-purpose food center in June, and is showing healthy sales because of it. The area, which includes kitchenware and appliances, houses a 60-seat restaurant featuring Cajun cuisine, a bakery, gourmet food center, and a Chinese take-out unit. According to Lovelace, the Oriental concept was targeted for $350,000 in sales its first year, but is likely to bring in far greater numbers than that. Dayton's has also had success following the frozen yogurt trend. Its Yogurt Express concept debuted two years ago. There are now four units, with another four scheduled to open this fall.

Sanger-Harris-Levys, like Neiman-Marcus and other retailers, has found that take-out is a growing trend in department stores, and the chain now concentrates on prepared foods to take home. The company is also planning to open a food court in its Dallas store in January, which will feature three concepts: gourmet burgers, gourmet pizza, and pasta. "We think these are significant trends in the restaurant industry, and believe they'll do well for us at the lunch hour," says Gussoni.

A growing market in the retailing sector is convenience stores, which are now paying particularly close attention to foodservice. Last year, foodservice sales among convenience stores increased by nearly $100 million, from $649 million in 1982 to $739 million. The convenience store subsegment showed a 13.9 percent growth rate in 1983, the highest growth rate of all retail subsegments, and twice the growth rate of the retail segment as a whole.

In many cases chains are allocating more overall square footage to their fast food items; menus are being expanded; quality improved; and sales promotion activity increased. Phoenix-based Circle K will complete a roll-out of its popular Deli Fresh line of super premium sandwiches this year, after introducing the product line just last year. In January 1983, the company went as far as to open a commissary to supply the chain with ingredients and supplies for the Deli Fresh line, and by year-end all stores will be serviced by the commissary. According to company spokesmen, Circle K is looking into other fast food-type menu items to expand on its successful line. Most recent additions to the menu have been a pimento-cheese sandwich, burrito, and soft tacos.

Circle K's interest in fast food is shared throughout the convenience store sector. Some of the top convenience store chains have even added fried chicken to their menus over the past year. National Convenience Stores, one of the many chains allocating additional space for its fast food merchandise, even provides seating areas for its customers. The chain, which devotes a lot of attention to fast food operations, is among those offering fried chicken.

Fast food, say many convenience store operators, acts as a great attraction and sales booster, and we will probably be seeing a lot more activity among chains in the future in regard to extending their menus. 7-Eleven, the largest of all convenience store chains, has even begun testing a new concept featuring baked goods and sandwiches. Though information on the new concept is sketchy, parent Southland's move to develop another food-driven concept says a lot for its optimism regarding convenience store foodservice.

On another fast food front, F.W. Woolworth says it will continue its development plans for Burger King units in its stores, despite the recent resignation of foodservices vice president Robert Powers. Powers, who joined the company in 1982, is largely credited with devising the franchise plan, which calls for as many as 150 Burger King units in Woolworth stores. The retail chain's first Burger King unit, opened this year in Manhattan, is reported to be on-track for $1 million in sales this year.

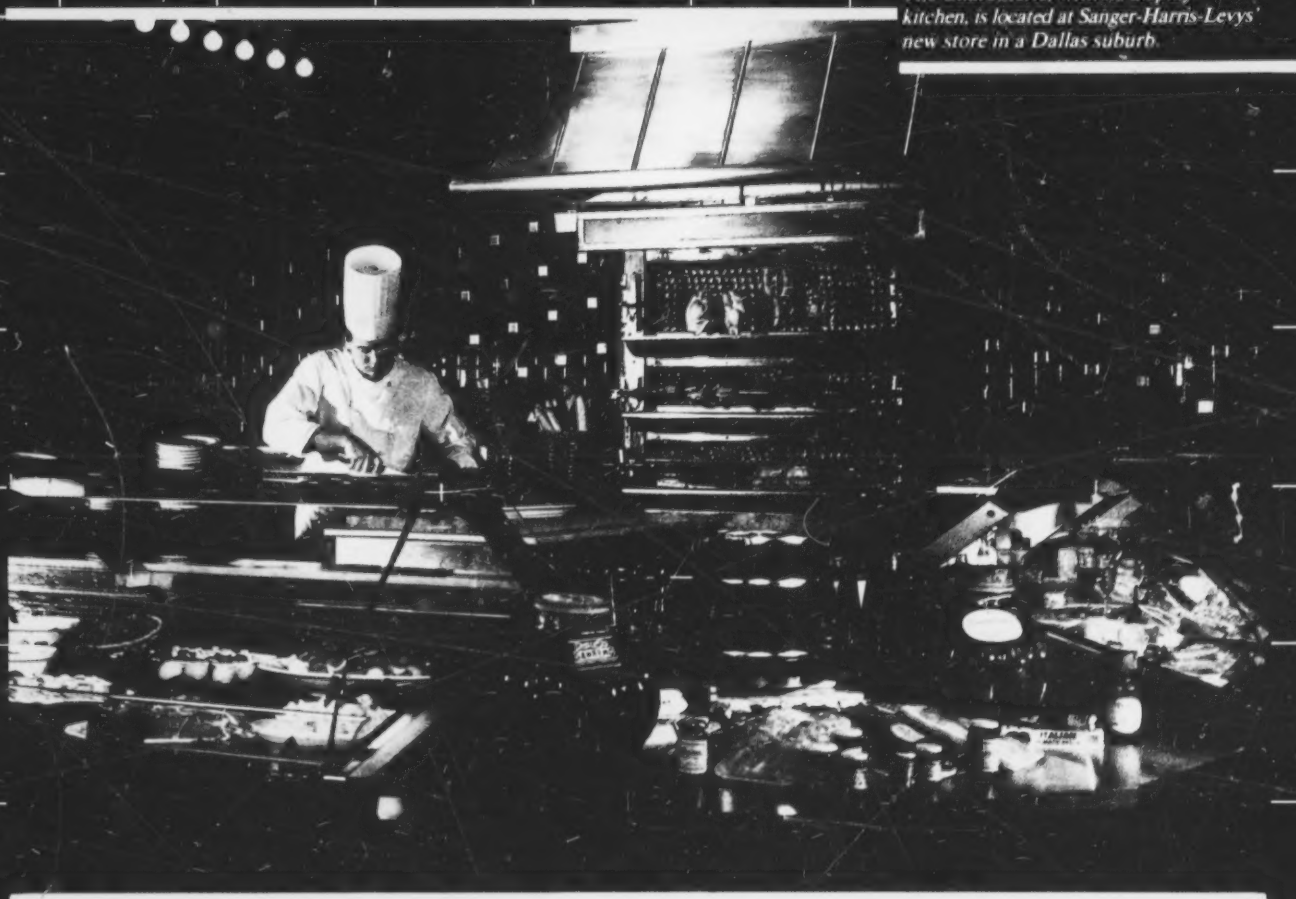
In the nation's capital a new food-retail mall has just opened, one the Rouse Company, its developer, hopes will be another blockbuster success. Called National Place, and opened in June, the new retail center is the first stage of a two-step plan. The second phase is scheduled for completion next spring.

Included in National Place are the likes of a new concept by the owners of American Café, Market Café. The concept stresses take-out and gourmet foods, and is expected to act as a vehicle for further development. Also in National Place is Hunan Express, a fast food Oriental concept; Everything Yogurt; The Boston Seafood Co.; and Au Bon Pain, among many others. The development is adjacent to a new Marriott Hotel. Food kiosks are located on the third floor so that shoppers must travel through the many specialty outlets of National Place to reach them. The second stage of National Place will be linked to the just opened development, and will be located in the renovated National Press Building.

Food-retail malls, spearheaded by the Maryland-based Rouse Company, have taken a firm hold in the past few years, and it's likely developments will further expand throughout the country in the coming years.

—Ralph Raffio

The retailing sector provides great opportunity for food service, and many are taking advantage of this positive trend.



The Charcuterie, with its display kitchen, is located at Sanger-Harris-Levys' new store in a Dallas suburb.

1982: $3,956,000,000 + 4.4% Sales Growth

1983: $4,228,000,000 + 6.9% Sales Growth

1988: $6,246,000,000 + 8.1% Compound Annual Sales Growth

Retail Market: Foodservice Sales

	1982 Sales ($000,000)	1982 Purchases ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales Growth ($000,000)	1983-1988 % Compound Annual Growth Nominal	1983-1988 % Compound Annual Growth Real
Department Stores	1,145	430	3.2	1,226	460	7.1	1,696	6.7	2.1
Variety & General	402	147	1.5	420	154	4.6	564	6.1	1.5
Drug & Proprietary Stores	358	131	1.5	382	140	6.7	386	0.2	-4.1
Convenience Food Stores	649	224	11.9	739	255	13.9	1,458	14.6	9.6
*Other Specialized Retail Stores	1,402	485	4.5	1,461	505	4.2	2,142	8.0	3.3
TOTAL	3,956	1,417	4.4	4,228	1,514	6.9	6,246	8.1	3.4

**Other specialized retail stores include: Food stores including grocery stores (excluding food convenience stores, gasoline service stations and miscellaneous retailers (liquor, cigar, etc.)*

The Business/Industrial Market

As America shifts from a smokestack economy to a service one, the Business & Industry (B&I) foodservice segment must meet the needs of an increasingly sophisticated, white collar workforce.

In 1983, the area registered a sales growth of 5.9 percent over 1982. Compound annual real growth, however, is estimated at only 1.5 percent over the next five years.

While some industries, in particular the automotive sector, have lately been on an upward economic curve, many observers view this new health as precarious. Other heavy industries—steel, farm equipment, and machine tools, for example—remain essentially depressed

As a result, many caterers have been de-emphasizing blue collar accounts and moving into new areas altogether. Ogden Food Service Corp., a subsidiary of Ogden Corp.—itself a highly diversified company which is rapidly becoming more services oriented—added no major B&I accounts in 1983. Instead, Ogden has concentrated on growth in its airline and leisure catering businesses, and in mid-1984 added additional airline territory to its $60 million Travel Services division by acquiring Air La Carte.

Population has dropped in many industry accounts. According to

1982: $7,875,000,000 + 1.1% Sales Growth 1983: $8,343,000,000 + 5.9% Sales Growth

1988: $11,189,000,000 + 6.0% Compound Annual Sales Growth

Business and Industry: Foodservice Sales

	1982 Sales ($000,000)	1982 Purchases ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales Growth ($000,000)	1983-1988 % Compound Annual Growth: Nominal	1983-1988 % Compound Annual Growth: Real
Contract Feeding in Plants *(Cafeterias primarily)*	2,258	1,028	-1.8	2,393	1,089	6.0	3,231	6.2	1.6
Contract Feeding in Business Offices	710	323	6.1	757	344	6.6	1,067	7.1	2.5
Internal Feeding—Plants & Business	1,458	693	-2.1	1,537	730	5.4	1,869	4.0	-0.5
Waterborne Employees	275	165	1.1	282	169	2.4	365	5.3	0.8
Mobile On-Street Catering	500	167	0.9	532	178	6.5	743	6.9	2.3
Food Vending Machines *(excluding packaged soft drinks and candy)*	2,674	866	-2.2	2,842	920	6.3	3,914	6.6	2.0
U.S. Defense Personnel	N/A	1,766	N/A	N/A	1,798	N/A	• • •	• • •	• • •
Food Furnished Foodservice Employees	N/A	3,624	N/A	N/A	3,809	N/A	• • •	• • •	• • •
TOTAL	7,875	8,632	-1.1	8,343	9,037	5.9	11,189	6.0	1.5

• • • *There is not sufficient data to develop individual projections for these sub-market segments.*

Gordon B. Parker, who as Caterer Operations Administrator at Ford Motor Co. oversees over 150 contract-operated cafeterias and executive dining rooms, foodservice volumes are a general indication of what's happening company-wide. "Our volumes have decreased," says Parker, "because there just aren't as many employees as before."

Within the past year, a merchandising program has been implemented in both catered facilities and all 50 company-operated locations to offset population losses and help put volumes back on speed. The thrust of the program has been to improve the image of foodservice as well as that of foodservice employees through more attractive serving lines, logos and uniforms, and through a variety of promotions.

"The most expensive fringe benefit that employees receive is in the area of health care and if eating makes them more healthy, everyone benefits," adds Parker. To that end, Ford has instituted a Heart Healthy program in its foodservice and employs a corporate dietician.

According to Richard Ysmael, who is in charge of about two dozen cafeterias operated by Motorola, many clients are scaling down their foodservice locations in terms of space allocated. Ysmael has recently developed and introduced "The Grabber," a prototype smaller operation which he describes as a cross between a traditional cafeteria and a fast food outlet.

By eliminating grills, fryers, and other equipment requiring HVAC, and by downsizing kitchen as well as dining space, The Grabber costs less than half of what a standard cafeteria would cost yet still provides an adequate selection of items, including sandwiches and pre-plated salads served on disposable ware. The concept is intended for buildings where the employee population is lees than 1,000, but can later serve as a satellite to a larger cafeteria as the population expands.

While some companies do continue to operate their own facilities in-house, many caterers note that new areas are opening up to them all the time. Explains Daniel R. Krpan, vice president sales & marketing for Canteen: "In general, institutions like hospitals and correctional facilities are opening up to us because they are realizing that their energies can best be utilized in their own areas of expertise, leaving foodservice to our expertise."

Low-labor cost foodservice is a major area of emphasis for Canteen. Having introduced its highly successful by-the-ounce program several years ago, the company has also moved into other less labor-intensive areas, such as build-your-own and self-service bars, pre-portioned foods, and cooperative service vending. And the company will continue to expand its self-service Gulliver's restaurant, a breakfast and lunch soup/salad/sandwich concept in-

Service Systems manages this employee cafeteria for a computer company located in California's Silicon Valley.

tended for multi-tenant office buildings as well as hospitals and colleges. There are about 20 Gulliver's around the country today, and Krpan reveals that Canteen will add up to 60 more in the next year.

Saga's well-documented move into restaurants culminated early this year with the formation of a new Restaurant Management division, which provides planning and management of complete food and beverage operations to the lodging industry. Saga now offers several concepts to lodging, including Velvet Turtle and its new Brandon's free-standing dinner house. Granada Royale Hometel has contracted with the Restaurant Management division for all of its new properties.

Quality, variety, high perceived value—in fact, all amenities that today's customer has come to expect from the public foodservice sector—appear to be the hallmarks of successful B&I operations. The key is offering choices. For instance, while healthy, nutritious dining is a trend that few contract foodservice managers have missed, no one is about to limit their selection to broiled fish and salads exclusively.

"We offer what sells, but we won't serve junk nutrition," says Erving Jensen, foodservice director for Continental Illinois National Bank. Eight years ago, Jensen points out, his company's foodservice was all steam tables and heavy food. Since then, grills, salad bars, and lighter foods have been added, and everything is cooked from scratch. Salt is minimized, low fat products are used, and meatless entrees are available. But, cautions Jensen, "The selection is such that customers make choices. We're not preaching to them."

Explains Arthur Pula, director of employee relations services for the Upjohn Company, which operates its own foodservice for about 25,000 employees worldwide: "There's still a need for a meat-and-potatoes type of entree because many people are making this their principal meal of the day. So we offer a wide selection of entrees, vegetables and salads as before, but now we're offering lighter portions because people are eating less food. They're not necessarily eating healthier food, but they do want smaller portions that they can mix and match more easily."

ARA has launched its highly successful "Choices" modular menu and service program. According to Joe Kingrey, president of the Business Dining Services division of ARA, Choices was designed to tailor foodservice to the specific needs of clients.

Choices consists of more than a dozen menu/service "modules," ranging from Fresh Starts (a breakfast program which also includes a different regional American breakfast—such as Pennsylvania Dutch or New York deli—every day) to Kettle Classics (specially developed soups), Sizzles (burgers, chicken, and battered items on a stick), and Cafe Features (entrees and daily specials, all with a regional flair).

Clients can pick and choose among the modules, which provide the entire operational package from recipes to graphics, and drop them into existing facilities, or they can have new facilities designed around the modules.

Expanding the concept further, ARA has also developed a Choices restaurant for large, multi-tenant office buildings. As in private locations, Choices public restaurants can incorporate any number of the available modules in a fast self-service format, generally ranging in size from 45 to 175 seats and utilizing a lot of take-out.

The multi-tenant building represents a relatively new but very profitable type of account for the contract caterer. New York-based Corporate Food Services, which specializes in upscale white-collar accounts, has a contract to provide foodservice for Blue Hill, an office complex in Rockland County, N.Y. By November, foodservice will be fully operational, and will include a food mall with various stations ranging from American Burger Works (fast food) to Mangia Mangia (Italian food and pizzas) and The Deli Corner. There will also be a large free-standing salad bar, a self-serve yogurt bar, and an entree station.

The food mall is located adjacent to a 700-seat atrium dining area and is surrounded by an upscale retail concourse. Also operated by the caterer is a 70-seat tablecloth restaurant called Images and a 65-seat lounge which serves pub food. The company is considering opening these latter two facilities for dinner.

Says Larry Appleton, foodservice manager for Martin Marietta: "Take-out has afforded us an expanded market, plus more employee service, using a fixed labor base." Employees can buy everything from box lunches to prepared entrees and deli meats by-the-pound.

Take-out is only the newest foodservice venture for Martin Marietta. The company keeps participation up to nearly 70 percent in the competition-soaked Orlando area by "paying attention to employee needs and what's going on in the outside world," as Appleton describes it. This means offering daily Blue Plate Specials which decrease in price 10 cents per day until the weekly low on Friday, when employees would be otherwise most likely to leave the premises for lunch. It also means an international food bar featuring a different country each week, priced by the item so patrons can make up their own combinations. Other draws include a portable Chicago-style hot dog wagon, the Colossus sandwich sold by the inch, a rotating variety of food bars (such as Mexican, fruit, sandwich, and health-oriented), and a fast food concept called the B-Line which combines a manual cafeteria with vending and serves a variety of "fun foods" in an outside eating area. **—Joan Lang**

The B&I segment must meet the needs of an increasingly sophisticated, white collar workforce.

The Transportation Market

The number of travelers within the United States remained steady at 1.1 billion in 1983, but the travelers stayed away from home longer, according to the U.S. Travel Data Center. Travel expenditures were up seven percent from 1982 to $210 billion.

U.S. residents spent $52 billion of their travel dollars on food, both in and out of the country. Other expenditures by citizens in 1983 included $40 billion on public transportation (including air, rail, and bus), $42 billion on auto travel, and $33 billion on lodging.

These expenditures leveled a positive impact on the transportation segment. Sales growth increased an impressive 11.2 percent over 1982.

In-flight foodservice shows great dichotomy, especially between exclusive airlines such as the new Regent with opulent gourmet meals, and budget airlines such as People Express which requires customers to purchase their onboard meals. "The split even between first class and coach passengers on major trunk carriers is becoming more and more obvious," notes John Tibitz, vice president of airline marketing for Sky Chefs.

TWA has aimed to lessen this gap by offering American cuisine to its coach passengers. The airline, which

Customer satisfaction is the goal of Marriott's In-Flight Services.

caters 15 to 20 percent of its own flights, has incorporated recipes of Vista Hotels' American Harvest restaurants into its in-flight offerings.

Big news in the in-flight foodservice industry this year was Ogden's acquisition of Air La Carte, ARA's inflight division. "We were both too small to compete against the giants, and Ogden was willing to pay us more than we were willing to pay them," says ARA's retired Air Services Group president Frank Johnson. The acquisition includes kitchens in New York, Hartford, Miami, Honolulu, San Francisco, and Los Angeles. The acquisition increased Ogden's inflight business by over 40 percent.

On Long Island, New York's MacArthur Airport in Islip, Chef-Aire Airline Caterers opened two years ago to service regional airports. Marketing themselves as a personalized service company, Chef-Aire is moving into Hartford's Bradley International Airport and targeting Albany, Kennedy, and others for future business.

Airport terminal foodservice operators are offering a wider variety of restaurants and promoting them as if they were freestanding independent operations.

Host International, ARA, and Sky Chefs lead this move toward diversification. In San Francisco International Airport's North Terminal, for example, Host (a division of Marriott Corp.) complements its coffee shop, dining room, and snack bar operations with two specialty shops: North Beach Deli, a New York-style delicatessen, and Crab Pot, a seafood restaurant. Host will soon roll out a made-to-order croissant sandwich restaurant where the croissants are baked in an open kitchen. At the other end of the price spectrum, Host offers cookies and Frusen Glädje ice cream in its terminal facilities.

Aiming to increase check averages of "those who buy a cola and a pack of potato chips," says ARA's Johnson, the contract caterer packages and markets a boxed meal. Packages might include a large hot dog, potato chips, potato salad, and a beverage, for example. ARA also offers fine dining in most of its terminal cities.

Sky Chefs too has diversified, offering a range from Häagen Dazs ice cream stands to upscale restaurants in its airport terminals. In New Orleans, a new Signature Room restaurant features signature items from popular local restaurants.

As more airlines move to the hub and spoke system—whereby most passengers transfer planes at a few major cities—foodservice has moved onto the concourse. "Customers with less than an hour to spare between flights will avoid leaving the concourse; now we and other caterers offer foodservice on the concourse level when airports allow," explains Bill Forte, director of food and dining services for Host.

Under test is an attractive snack cart adorned with small bright lights that serves cold sandwiches, yogurt, pudding, soft drinks, fruit juices, cookies, Danish, and hot dogs cooked on a roller grill. An added benefit is that since only one person is needed to run each cart, labor costs are low.

As part of the Los Angeles airport's $700 million renovation, the nation's largest airport restaurant was built. The 26,000 square feet includes a buffet restaurant, a cocktail lounge, and private party rooms.

Amtrak, the nation's leader in rail service, emphasizes that 80 percent of its new menu is prepared fresh on the trains. Previously food was preplated, frozen, and reconstituted. Breakfasts are made to order, and dinners differ each night. Food costs have remained at 45 to 50 percent with the new menu. Average check has remained at $6.75 for a four-course meal.

Passenger traffic was down 11 to 16 percent on Greyhound buses this year through July, partly due to stable gasoline prices and partly due to the bus drivers' strike that halted service for many weeks. Still, foodservice sales dropped minimally. Over the last few years, Greyhound Food Management (GFM) converted most of its Post House restaurants to theme restaurants and Burger Kings with both terminal and street access. Vending services were modernized. Due to these moves 30 percent of GFM's bus terminal foodservice sales are from customers other than travelers, such as nearby office workers.

Many remaining Post Houses will be converted within the next couple of years to some other franchised fast food concept, as yet unnamed, according to president Joe Fassler.

Uncertain of bus passenger reliance in the future, GFM is moving into the freestanding restaurant market with a gourmet hamburger concept called T. Twiggs; the first, which recently opened in Evansville, Indiana, is projected to have first year sales of $1.3 million, with 150 seats and an average check of $7.

Continental Trailways has replaced its old-line cafeterias with brightly colored snack bars. Three other operations were converted to Hardee's. The result has been a sales increase of 30 percent overall with reduced labor costs. "We don't have a single operation that isn't profitable," says Trailways Food Services president Dave Laughlin.

Marriott considered abandoning the toll road business but gave the market one last chance by converting coffee shops to Roy Rogers, Bob's Big Boy, or both concepts on the same site. In six weeks Marriott gutted six New Jersey Garden State Parkway toll road restaurants and replaced them with the dual concepts. Projected sales for the six units are $15 million. The corporation is now bidding for toll road locations in Connecticut and Indiana.

—Rona Gindin

Airport terminal restaurants are more diverse than ever, and these concepts are being promoted heavily.

Sky Chef's Signature Room is a major part of recently renovated food and beverage facilities at New Orleans International Airport.

1982: $2,073,000,000 + 5.4% Sales Growth

1983: $2,306,000,000 + 11.2% Sales Growth

1988: $3,515,000,000 + 8.8% Compound Annual Sales Growth

Transportation Market: Foodservice Sales

	1982 Sales ($000,000)	1982 Purchases ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales Growth ($000,000)	1983-1988 % Compound Annual Growth Nominal	1983-1988 % Compound Annual Growth Real
Air & Rail *(in transit)*	1,087	533	2.9	1,218	597	12.1	***	***	***
Terminal Facilities	550	192	8.3	609	212	10.8	***	***	***
Highway *(Interstate)*	302	107	8.2	331	117	9.7	***	***	***
Passenger & Cargo Ships	134	74	8.9	148	82	10.1	***	***	***
TOTAL	2,073	906	5.4	2,306	1,008	11.2	3,515	8.8	4.1

*** *There is not sufficient data to develop individual projections for these sub-market segments.*

The Health Care Market

Foodservice operators serving the health fields are developing a reputation for being more cost-conscious and sales-driven than ever before.

The reason for casting an eagle eye on services and the bottom line can best be explained by the far reaching changes in the health field itself. During the past two years, the federal government has gained further regulatory authority to determine what hospitals may charge patients for their services, and it has made similar alterations in its own reimbursement policies. The end result has been necessary belt-tightening to compensate for what the government no longer provides.

Foodservice in health care is a $12 billion-a-year business. Internally run foodservice continues to dominate the health segment, accounting for more than $8 billion of total sales, though external factors are beginning to shift that stronghold.

To be sure, the health care market presents an interesting mix of opportunity and misfortune for those in foodservice. In-house foodservice directors are being pressured to control costs and increase sales. That inevitably creates difficult challenges but an incentive to be innovative with foodservice also emerges.

Many in-house administrators have met this challenge head-on. "We in health care have been forced to expand our revenue base," says Barry Hutchings, foodservice director of the Swedish Medical Center, Englewood, Colorado. "That means we have to go outside the boundaries of feeding patients and staff and look to less traditional methods of selling food and services."

Hutchings, along with many of his colleagues, is experimenting with gourmet take-out items. Take-out attracts the many women employed in hospitals, as well as guests on their way home from an evening visit. Swedish Medical also sells bulk food items, such as cookies and breads, which people might otherwise run to a convenience store or grocery to buy.

"Traditionally, 60 to 70 percent of our volume was through patient care activity," says Hutchings. "That's decreased to about 30 percent today so we've got to concentrate our efforts on other things besides just patients." The foodservice director is now designing a multi-option, "very commercial looking cafeteria with a retail air." It will include a quick stop, bake shop, deli, ice cream bar, salad bar, and hot food line.

Jack L. Bowman, director of foodservices, St. Joseph Hospital, Omaha, says that in-house foodservice directors are finding it necessary to keep up with overall trends in the restaurant industry.

Bowman has introduced a baked potato bar to his facility. "Why should we let an employee, or guest for that matter, go across the street to Wendy's if we've got the capabilities to offer the same thing over here?" Bowman concedes that cost-cutting is a real problem for in-house feeders, though he insists that through creative menu planning and merchandising sales increases can be attained to offset costs.

"Our check average has gone up 40-cents this year, without any price increases," he says.

On the contract foodservice side, many operators say that health care's belt-tightening crisis can well work to their own advantage. Last year again showed an upward trend for contract foodservice in the hospital/nursing home market. Total sales on the contract side of health care feeding edged over the $1 billion mark in 1983; that adds up to a 9.4 percent sales growth over the year before—the largest percentage increase in the segment.

"We're seeing doors open to us because of the cost factor," says R. William Edmundson, president of ARA Services's hospital food management division. "But a lot depends on the facility's in-house staff. If they can control costs by being efficient, then they're likely to be doing as good a job as we can do. If they're unable to do so, administrators will probably have to come to us."

Edmundson says that while it is important to continue providing excellent service to patients, the non-patient side of health care is the most critical today.

"Hospitals are finding it very difficult to justify subsidizing employee meals, for example, and we've been seeing many institutions change their policy in regard to subsidies," says Edmundson. "The cafeteria is there to sell food, and the more it sells the better—that's good for everyone. As far as we're concerned, when a hospital stops subsidizing employee meals, our job becomes that much more involved. When employee prices and outside prices merge, marketing becomes more

important."

ARA, with 350 health care accounts, sees one-third of its new business coming from long-term care facilities, such as nursing homes and retirement communities.

"Business from retirement communities is growing rapidly," says John Metz, founder and head of Custom Management, the nation's largest private contract management firm. "It's interesting to note that these facilities are cropping up all over the country, not just in Sun Belt regions, which causes our business to be spread out all over the country. As the population gets older, this segment of health care is proving a very lucrative one for the contract catering industry."

ARA's Edmundson agrees. "The people who build retirement communities, for example, are in the real estate business, not the food business. They need us to offer good foodservice, and in the future contract caterers will be getting more accounts from that sector." Contract caterers, including Saga, Canteen, Marriott, Service Systems, and others agree—all are aggressively targeting these facilities.

—Ralph Raffio

Catering to the special dietary needs of patients is an important factor in hospital foodservice for ARA.

1982: $11,335,000,000 + 6.6% Sales Growth

1983: $11,963,000,000 + 5.5% Sales Growth

1988: $16,157,000,000 + 6.2% Compound Annual Sales Growth

Health Care Market: Foodservice Sales

	1982 Sales ($000,000)	1982 Purchases ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales ($000,000)	1983-1988 % Compound Annual Growth: Nominal	1983-1988 % Compound Annual Growth: Real
Hospital—Internal	7,641	3,439	6.4	8,038	3,618	5.2	10,534	5.6	1.0
Hospital/Nursing Home—Contract	989	396	9.6	1,082	433	9.4	1,690	9.3	4.6
Other Institutions—Internal *(For specialized care including nursing and old age homes, orphanages, etc.)*	2,705	1,662	6.1	2,843	1,747	5.1	3,933	6.7	2.1
TOTAL	11,335	5,497	6.6	11,963	5,798	5.5	16,157	6.2	1.6

The Student Market

Change comes slowly to the student foodservice market, and today's developments generally stem from the arrival of fast foods on campus approximately 10 years ago. What is new is the tremendous sophistication this breakthrough has bred. Marketing techniques previously limited to retail establishments now alert students to their many choices. Even grammar school children are receiving dual entrees in some districts.

Reinforcing the move towards marketing are certain demographic changes in the nation's student body. For starters, the customer base is shrinking. Enrollment has been declining since 1971 when the last of the baby boomers hit grammar school. According to Tom Snyder of the National Center for Education Statistics, this trend will start to reverse in 1986 as the result of a baby "boomlet" currently underway. This will not affect high school enrollment, however, until 1991.

College enrollment has dropped only slightly in the 1980s, bolstered up by returning older students. Fewer students, however, are attending full time. Consequently, college operations are being forced to pay more attention to staff members as well as to commuters.

RGI figures indicate a slowing of growth. While growth in 1982 was 8.0 percent, growth in 1983 fell to 6.3 percent. Further, growth for 1983-88 is projected at only 3.7 percent.

To keep students on campus, college operators are finding a variety of ways to duplicate off-campus retail experiences. Custom Management Corp., which has approximately 100 student accounts, recently increased sales by converting an underutilized vending machine area into a Rathskeller at Duquesne University in Pittsburgh. In an even clearer echo of the off-campus competition, the company is canopying, paneling, and adding cordons to many of their campus serving areas.

ARA Services is also "restaurantizing" its foodservice, according to vice president of marketing Tony Wilson. It's a Pizza is the firm's on-campus pizza parlor, located in college snack areas. Dorm delivery is an important aspect of the concept, generating a substantial part of sales.

Edinboro University is one of several hundred institutional accounts serviced by Custom Management Corp.

El Pollo Grande is the firm's new Mexican concept, now entering test markets in the Northeast.

ARA has recently dived into marketing too. College newspaper ads and t-shirts advertise the restaurants. Custom-made wagons sell bagels, sandwiches and other snacks. The company has even published a new book, *Guide to Good Times*, that outlines 59 ways to avoid boredom in the dining halls.

For the last year, Saga Corp. has been introducing new tastes through its highly centralized "trend setters" program. Under this program, Saga's operations add a popular specialty item to their regular dining hall menus five times a week. Fried mozzarella, crepes, and croissant sandwiches are typical additions.

Complementing this program are "pace changers"—do-it-yourself food bars (tacos, baked potatoes, cheese cake, etc.) set up two to three times a week.

Despite the new on-campus dining options, students are rebelling against mandatory board plans, especially those that penalize them for absenteeism. To counter this, some universities are dropping the board requirements and others are creating credit card or "point" systems which enable students to pay only for what they eat.

Among the more innovative meal plans is the University of Maryland's campus-run DS Cash Program. The univeristy foodservice operations include four dining halls for boarding students and a selection of cash restaurants for commuters and staff. To build customer loyalty at the restaurants, the campus will set up cash accounts which allow customers to pay in advance and then "charge" their meals. Account holders also enjoy a 10 percent discount on restaurant purchases.

Maryland's boarding students are also encouraged to eat periodically at the campus restaurants. When they substitute a dining hall meal for restaurant fare, they are given a $1.56 discount (the cash equivalency of a dining hall meal).

Another issue of increasing interest to students and operators is nutrition. Students eating in dining halls operated by Philadelphia-based The Freshie Company can now check the nutritional content of their meals by consulting computers set up in eating areas. Saga places calorie information right on their menu boards. At the Virginia Polytechnic Institute and State University in Blackburg, Virginia, the campus' independent foodservice administration sponsored an all-day food and health exposition.

While much initial menu experimentation occurs in college operations, secondary schools are not far behind. Having endured multiple levels of governmental scrutiny, fast food is now a standard at many high schools. This has significantly increased high school food sales. One recent example: The Freshie Company raised daily sales from $500 to $2,000 a day at one Philadelphia high school last year by adding a fast food menu.

Healthy foods are also in demand at the secondary level. According to ARA Service's vice president of sales and marketing for school nutritional services, Linea Storm, salad bars are now common in high schools (and increasingly frequent in grammar schools too). ARA is currently stepping up its nutrition program with low fat foods that will include such items as pizza made with low fat cheese.

Profitable high school operations enable school systems to pour more money into grammar school lunches, which have generally survived the federal budget cuts very well. As a result, grammar school students are seeing less pre-packaged foods, eating more fresh vegetables, and like their older counterparts, choosing among a growing variety of foods. **—Alexa Bell**

Student Market: Foodservice Sales

1988: $9,410,000,000 + 3.7% Compound Annual Sales Growth

	1982 Sales ($000,000)	1982 Purchases** ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales Growth ($000,000)	1983-1988 % Compound Annual Growth: Nominal	1983-1988 % Compound Annual Growth: Real
School—Internal *(public, parochial, elementary & secondary)**	2,464	2,814	4.2	2,496	2,690	1.3	2,564	0.5	-3.8
School—Contract	720	295	9.5	723	287	0.4	953	5.7	1.1
Colleges, Universities—Internal	2,783	1,243	9.7	3,061	1,268	10.0	3,874	4.8	0.3
Colleges, Universities—Contract	1,407	451	10.7	1,556	460	10.6	2,019	5.3	0.8
TOTAL	7,374	4,803	8.0	7,836	4,705	6.3	9,410	3.7	-0.8

**Actual cash receipts from children plus parochial and other private schools.*
***Not including $841 million worth of commodities and milk—a -13.7% decrease from 1981.*

The Leisure Market

Nineteen eighty-four has been a year of reassuring prosperity for most leisure foodservice operators. Long considered recession resistant, the leisure industry suffered low sales growth during the economic difficulties of the early 1980s. Last year, however, operators reported an increase in growth over troubled 1981; this year many are proclaiming a return to widespread health.

There are some notable exceptions: park attendance, siphoned off in recent years by foreign markets and a strong dollar, remains down. The World's Fair in New Orleans has not met attendance projections. Yet, overall business is good.

Much of the growth reflects the general economic upturn now delighting the nation. RGI figures indicate that overall growth is up from last year. Sales growth for 1983 was 7.3 percent, an increase of 1.3 percent over 1982. Among sub-segments, drive-in movie theaters constituted the growth leader, registering a 10.1 percent growth rate in 1983. Summer camps and hunting facilities registered the lowest growth at 1.5 percent. As a whole, the outlook is positive, with a 7.5 growth rate projected for 1983-88.

However, because the leisure segment encompasses a broad spectrum of operations ranging from theme parks to stadiums, museums to resorts, a variety of factors can affect sales. Weather wields an unpredictable and immediate influence over resort and park sales. Strikes, such as the 1982 football strike and the 1981 baseball strike, directly impact stadium business. Museum and theater food operations bloom with blockbusters and lag with ho-hum seasons.

This year, no major weather disasters have marred attendance, and operators claim that customers have been both plentiful and willing to spend more on food than in the past. As a result, leisure foodservice operators are, like the rest of the industry, upscaling their establishments.

Breaking ground on this front was the year's most anticipated leisure event, the Summer Olympics in Los Angeles. Primary feeder ARA Services, Inc. created an extensive system designed to project a wholesome Olympic image while feeding some 700,000 tourists and 3 million local residents during the two week contest. ARA also provided foodservice for the 12,000 athletes and support staff members.

Because of the volume demands, ARA built all foodservice at the Olympic hub, Exposition Park, around pre-prepared foods. To avoid an un-Olympic commercial look, great attention was given to developing a "picnic atmosphere" with festive tents. Pre-packaged picnic lunches and baked goods were specially prepared and wrapped to appear homemade.

Supplementing these items at other locations was a round up of fast foods found more often in cafes than stadiums and fields. For example, at the LA Coliseum, where the track

This German brau hall is recreated at Disney's Epcot Center in Orlando, Fla.

and field events were held, vendor Volume Services altered its usual menu to include croissant sandwiches, fresh fruit salads, yogurt, and bagels with cream cheese.

Feeders at more routine sports events are also breaking away from the traditional hot dog and popcorn hegemony. Leading the pack is Olympia Arenas, Inc. (OAI), a subsidiary of Little Caesar Enterprises of Farmington Hills, Mich.

At its Joe Lewis Arena in Detroit, OAI has created a food fair arrangement containing a variety of canopied fast food concepts. Two Little Caesars outlets sell pizza by the slice (the arena's best seller) and a Mexican unit called Pancho's offers freshly made Tex-Mex items. Everything Yogurt, a franchised yogurt concept, and Bananas, a fruit concept, offer healthy alternatives. An express beer stand and Good Humor outlet complete the offerings.

"The look reflects a mall approach, with mercury vapor lamps and light oak panelling," says Jim Lites, vice-president of administration and operations.

Volume Services, which is the leisure division of Interstate United Corporation, has also been experimenting with new foods at non-Olympic events. According to senior vice president of marketing, Ken Young, nachos are outselling hot dogs at Arlington Stadium in Texas.

At the Louisiana World Exposition, running May to October in New Orleans, trendy fast foods are selling better than traditional items, though both are being outperformed by full-service restaurants.

The fair contains approximately 100 food or beverage outlets, 85 percent of which are fast food. Among the popular fast foods are over-the-counter crawfish (a local specialty), French-style sandwiches on baguettes, and the fair's most successful concession items, alcoholic frozen beverages.

Since attendance is running painfully below projections, New Orleans has not seen the overflow economic benefits that previous host cities have reaped. An exception is The Fulton Street Mall, a warehouse road that was renovated to hold most of the fair's full-serve restaurants. These restaurants, many of which feature international cuisine and offer entertainment, are not only meeting but exceeding projections. Victor Trapani, director of marketing/food and beverage concessions, predicts that some outlets will become permanent fixtures in the New Orleans restaurant world.

Full service restaurants are also outperforming fast food outlets at Walt Disney World's Epcot Center, in Orlando, Florida. Among Epcot's most well-known restaurants is Les Chefs de France, operated by renowned chefs Paul Bocuse, Roger Vergé, and Gaston Lenotre. Despite average per person dinner checks of $16-$18, the restaurant has been so successful that the owners are opening a second restaurant upstairs called Le Bistro de Paris. Also new to Epcot this year will be a Moroccan concept called El Marrakech.

Heightened customer involvement is increasingly important at smaller theme parks too. "We're preparing foods so that people can participate," says Melinda Ashcraft, director of foodservice at Bally Manufacturing's Six Flags Magic Mountain. Char-broiled meats, grilled corn-on-the-cob, and ice cream on homemade cones are new entries at Six Flags parks. Along with these new offerings come an improved price/value relationship: portions are larger and so are prices.

Upscaling is also occurring in the conservative museum/theater subsegment. Phoenix-based Greyhound Food Management has recently "themed" the foodservice outlets at the Los Angeles Museum of Art. Similar upgrading is planned for the San Francisco Opera House. Meanwhile, Restaurant Associates, headquartered in New York, has introduced regional specialties at Longwood Gardens in Kennett Square, Pennsylvania.

—Alexa Bell

Leisure Market: Foodservice Sales

1988: $4,400,000,000 + 7.5% Compound Annual Sales Growth

	1982 Sales ($000,000)	1982 Purchases ($000,000)	1982 vs 1981 % Sales Growth	1983 Sales ($000,000)	1983 Purchases ($000,000)	1983 vs 1982 % Sales Growth	1988 Sales Growth ($000,000)	1983-1988 % Compound Annual Growth: Nominal	1983-1988 % Compound Annual Growth: Real
Theme Parks, Arenas, Stadiums, & Tracks	1,873	657	6.0	2,011	705	7.4	***	***	***
Drive-In Movie Theaters	216	68	15.4	238	75	10.1	***	***	***
Bowling Lanes	646	236	4.6	693	253	7.3	***	***	***
Summer Camps & Hunting Facilities	115	69	-0.5	117	70	1.5	***	***	***
TOTAL	2,850	1,030	6.0	3,059	1,103	7.3	4,400	7.5	2.9

*** *There is not sufficient data to develop individual projections for these sub-market segments.*

17th Annual Restaurant Growth Index

by Jeffrey Hall

Changes in American society—income, population, family structure—will present challenges and opportunities for restaurant executives.

How will the restaurant industry grow in the second half of the 1980s? Growth *will* come—few observers doubt that. Economist Michael G. Van Dress states in a recent U.S. Department of Agriculture report, entitled *Dining Out,* "The (restaurant) industry will likely expand at a slower rate than it did in the 1960-1979 wave of development." Van Dress foresees stiff competition among restaurants, with resulting measures such as price cutting, promotions, menu expansion, and increased services.

The detailed tables that make up the heart of the Restaurant Growth Index give you specific market information that tells you how likely the consumers in each area are to eat out (the Restaurant Activity Index, or RAI) and how well supply meets demand in each market (the Restaurant Growth Index, or RGI). More information on the technical aspects of these data is given in the accompanying definitions, but the key point for now is that these tables give you a tool for getting a grip on current trends in your market area. But to show the background for the situation in each specific area, we turn in this article to a look at overall social and industry trends, and how the foodservice industry is affected by them. This broad, long-range survey of the trends we face will focus on a variety of topics: Winners and losers in market growth; income trends; the aging of the population; changes in family structure; and the growing success of women in economic life. Together, these changes in our society present challenges and opportunities for the restaurant executive ready to recognize them.

A major change in America continues to be in where people live. In the early 1970s, analysts noticed for the first time in recent decades that the population outside metropolitan areas was increasing more rapidly than that inside. Now, it appears as if that trend has reverted to the older historical pattern. Although non-metropolitan areas are still growing, the metropolitan areas are once again enjoying faster growth.

Metropolitan growth has tended to concentrate in suburbs rather than central cities of these metros, as has been the case during recent times. Newer, western and southern metropolitan areas are growing, in many cases including their central cities, while the cities in the Northeast and Southwest lost population. *Table 1* shows the 25 largest cities in the nation, all of which form the hubs of major metropolitan markets. Many of these cities are losing residents, often to their suburban rings. However, those in the South and West have tended to grow, to the point where 14 of the 25 largest cities are now found in these regions.

Table 1 also shows trends in median family income during the 1970s in these large cities. As we see there, the national median family income grew by 108 percent during that decade. Of course, most of this growth was due to inflation, but the figures remain useful for comparing trends in different cities. *Table 1* shows that Houston and San Jose were the big winners with median family income growing much faster than the national average. San Antonio, Phoenix, Denver, New Orleans, and Seattle had growth at nearly the national rate. On the other hand, Detroit, New York, Boston, Cleveland, and Baltimore lagged behind in their rates of family income growth.

These rates of growth do not show the entire picture of course. For example, overall median family income remains higher in Boston than in San Antonio—but the trends, revealed by comparing rates of growth, do show increasing economic vitality along with growing population in cities in the sun belt, while older industrialized cities are lagging behind.

More up-to-date information on a national basis is available for household income. (Households include persons living alone or unrelated groups, while families must have at least two people and these must be related.) Median household income has grown from $7,143 in 1967 to $20,171 in 1982. This growth in income may now be the most significant factor in restaurant growth for, as Van Dress points out in the above-mentioned report, "Rising incomes have drawn the American diner away from home." Yet, in terms of spending power, real median income after inflation has been taken into account has actually declined slightly. Nevertheless, the

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perception of more money in the paycheck has encouraged a psychology of increased consumer willingness to spend.

An important income trend is shown in *Table 2*. The increasing number of households earning under $15,000 is counterbalanced by an increase in those earning over $35,000. These figures have been adjusted to take inflation into account. Declines have occurred in the middle-income categories. If this trend continues, it points up the crucial importance of careful targeting of your marketing, advertising, pricing, and menu decisions; few restaurants will be able to serve the broad spectrum of the consuming public as that public becomes less of a broad spectrum and more specialized in tastes, preferences, and abililty to pay for inexpensive meals or luxury dining experiences.

How you identify and appeal to your segment of the market becomes an increasingly important question. For restaurant owners and managers fortunate

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Table 1

America's 25 Largest Cities [1]

City	1982 Population	1970 Population	pop. % change '70-'82	med. fam. income % change '70-'80
New York, NY.	7,086,096	7,895,563	-10	74
Los Angeles, CA.	3,022,247	2,811,801	7	85
Chicago, IL.	2,997,155	3,369,357	-11	83
Houston, TX.	1,725,617	1,253,479	38	122
Philadelphia, PA.	1,665,382	1,949,996	-15	75
Detroit, MI.	1,138,717	1,514,063	-25	69
Dallas, TX.	943,848	844,303	12	97
San Diego, CA.	915,956	697,027	31	98
Phoenix, AZ.	824,230	587,016	40	104
San Antonio, TX.	819,021	708,582	16	105
Honolulu, HA.	781,869	630,528	24	89
Baltimore, MD.	774,113	905,787	-16	78
Indianapolis, IN.	707,655	793,769	-11	92
San Francisco, CA.	691,637	715,674	-3	99
San Jose, CA.	659,181	461,212	43	115
Memphis, TN.	645,760	657,007	-4	96
Washington, D.C.	633,425	756,668	-16	99
Milwaukee, WI.	631,509	717,372	-12	92
Columbus, OH.	570,588	540,025	6	90
New Orleans, LA.	564,561	593,471	-5	102
Boston, MA.	560,847	641,071	-13	76
Cleveland, OH.	558,869	750,879	-26	76
Jacksonville, FL.	556,370	528,865	5	104
Denver, CO.	505,563	514,678	-2	102
Seattle, WA.	490,077	530,831	-12	100

[1] *As of mid-1982 by rank with population and income change.*

Table 2

Household Incomes				
	Under $15,000	$15,000-$25,000	$25,000-$35,000	$35,000 & over
1967	34.9%	27.0%	22.3%	15.8%
1982	37.4%	23.6%	16.9%	22.1%

Dollar figures are in terms of 1982 buying power.

enough to be located in growing market areas, the task may be easier: Where there are increasing numbers of people with growing incomes, there should be increasing numbers of customers. But even with that pleasant prospect, the kind of people who are current or potential customers is changing. We'll turn next to these changes, starting with one that could have a dramatic effect on the foodservice industry as a whole.

If recent patterns of birth, death, and immigration continue, the U.S. is about to enter a period of slowing growth. Although the total number of Americans will increase, that increase will come at an ever-slowing rate. Thus, although individual businesses or companies may be located in a growth market, the foodservice industry in general is not, nor is any service and consumer oriented industry.

Growth in the foodservice industry will come through better market penetration and expansion. The total customer base is growing slowly, so restaurants must find ways to inspire current customers to dine out more often, and to lure customers who previously devoted more of their food dollar to at-home consumption. The industry has been doing a great job of accomplishing that over the past two decades, but a point will eventually be reached when this task becomes more and more difficult. As the nation's growth slows and the foodservice industry becomes increasingly competitive, what characteristics will mark the new customer?

With the slowing growth in population comes an aging of Americans. The average age of the population, now almost 31 years, will continue to go up, as the number of babies born remains low, while the lifespan of adults continues to lengthen. By the end of the 1980s, the median age will have reached 33, and by the end of this century, half the population will be over 36. The average lifespan will have risen to 71.6 years for men and 79.2 years for women by 1990. In that same year, nearly 32 million Americans will be over 65. One of the greatest opportunities for growth in the foodservice industry is in response to this maturing of the market.

Related to this aging of the population is another significant trend: Rapidly growing numbers of retirees. At the current time, there are 5.2 people of working age, 18-64, for every person of retirement age. But because our population is growing older, that number will drop to 4.7 working-age Americans for every retirement-age person by the year 2000. The longer-term view is even more startling: A person entering the job market this year at the age of 21 might anticipate retirement at age 65 in the year 2028. By that time, for every retirement-age American, only 2.7 working-age people will be available for the job market. Although this long-term trend won't show an immediate impact on the restaurant industry (it might suggest, however, that you consider planning carefully for your own retirement), it does point out dramatically the extent to which the market for the foodservice industry is growing older. Long range plans for expansion must take this trend into account.

Increasing fragmentation of household and family units is another important demographic factor. Restaurants should find ways to encourage persons living alone to rely on the foodservice industry. Currently, one-person households are more likely than any other size group to devote a large portion of their food budget to food away from home. About 45 percent of the food dollar of single person households goes to foodservice.

Many different trends have led to a growing proportion of households occupied by persons living alone, to the point where now nearly one of every four households is occupied by an individual. In 1970, the figure was only 17 percent. Among the trends contributing to this is the aging of the population. About 30 percent of our elderly live by themselves. Also significant is the increase in the number of divorced persons, many of whom are now occupying one-person households. In 1960, for every 1000 married persons, there were 35 divorced persons. That grew to 47 in 1970, then began increasing at an even greater rate. By 1980, we had 100 divorced Americans for every 1000 Americans, and by 1983, the number had grown even more, to 114. This, along with people's tendency to wait to a slightly older age before entering marriage, has led to the growth in persons living alone. These one-person households constitute an important part of the market for food away from home, both at lunch and in the evening.

Single-parent families also present an opportunity for the foodservice industry. Both as a treat for the children and a respite from the demands of cooking for the working parent, a meal out can be especially appealing to this growing segment of the population. In 1970, 12 percent of all children lived with one parent; by 1980, that had grown to 20 percent, and by 1983, nearly 23 percent of all children lived with only one parent.

Perhaps the most significant demographic trend of the 1970's, and one that continues up to the present, is the changing status of women. In 1970, 43 percent of women over the age of 16 were in the work force; this included about 5 of 10 women between the ages of 20 and 44. By 1982, 53 percent of all women over 16 were in the work force, including nearly 7 of 10 women between 20 and 44.

This increase in working women means an expanded customer base for the foodservice industry; more dual-earner families, with additional disposable income for dining out; and more women in the lunchtime popula-

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tion served by the foodservice industry in restaurants and on-site facilities.

And women's participation in the labor force is by no means confined to dead-end or lower paying jobs. The biggest increase among major occupation groups came in the executive, administrative, and managerial area, where women held 18.5 percent of all jobs in 1970. By 1980, 30.5 percent of these upper level jobs were being done by women. Female participation also grew significantly in professional specialty positions (44 to 49 percent), technical jobs (34 to 44 percent), and sales (41 to 47 percent). Although many other occupations are still the domain of one sex or the other (craftsmen's jobs stayed about 94 percent male, clerical jobs moved from just under to just over 75 percent female), the increase in women in the work force makes them one of the most important targets for increasing the customer base of the foodservice industry in the face of the overall slowing of population growth in this country.

We have seen from this survey of some of the major demographic trends in the U.S. that the task facing the foodservice industry is not an easy one. Yet the same changes that make success more difficult also present opportunities for those who recognize and seize them.

The maturing of the market has brought about a renewed interest in expansion of menu items and targeted promotions. The growing workforce and the increasing number of women in white-collar poistions, as well as the increase in the number of persons in the more affluent income categories presents the opportunity for increasing lunchtime business. Women in the workforce may also create a growing demand for breakfast.

Definitions

Updated from the 1980 U.S. Census of Population and Housing, it is an estimate of the number of people living in an area at the end of the year. It includes people living in colleges and hospitals, and armed forces permanently assigned to the area, but excludes tourists and transients. Large changes in group-quarters populations are not projected in these forecasts.

Demographic statistics have been estimated employing a population component procedure. That is, independent county estimates of births, mortality, and migration are generated. These population components are aggregated and either added or subtracted from the appropriate benchmark.

Fertility rates, for example, have been projected at their current rate of change. We assume that the pattern of births will continue its slow but steady rate. Similarly, we have asssumed that no major medical advancement will be found over the next few years and that the mortality rates that are in effect today will continue unmodified.

Percent of U.S. Pop.:

A market's share of the total U.S. population.

Household:

A household consists of all the people occupying a single housing unit under 1980 census rules—such as a house, an apartment, a group of rooms, or a single room. The members of a household need not be related, and a single person living alone in a housing unit is also counted as a household.

All persons who are not members of households are regarded as living in group quarters: institutions, college dormitories, military barracks, etc. Caution: Although a county's population total will include all the people in the area, the household total will not do so because it excludes those living in group quarters.

Average Household Size:

Total population divided by the number of households. Depending upon whether it is above or below the U.S. average, it is used as a rough indicator of the relative importance of family-type units or single-person units in a local area.

However, the figure can be artificially high in those relatively few counties where there is a disproportionate share of college, military, or other types of institutional population. The people living in such group quarters are part of the population total, but their dwellings are not part of the household total.

Eating and Drinking Places:

Includes establishments selling prepared foods and drinks for consumption on or near the premises or for takeout, as well as lunch counters and refreshment stands selling prepared foods and drinks for immediate consumption. Also included are caterers and in-plant food contractors, as well as leased eating and/or drinking concessions in theaters, hotels, amusement parks, etc. Restaurants and lunch counters operated by department stores are classified in General Merchandise Group; those operated by hotels are classified in the Hotels Group.

Eating Places:

Includes retail sales of restaurants and lunch rooms, social caterers, cafeterias, fast food sales, contract feeding, and ice cream and frozen custard stands. Excludes drinking place sales.

Restaurants:

Establishments engaged in serving prepared food and beverages selected by the patron from a full menu. Waiter or waitress service is provided and the establishment has seating facilities for at least 15 patrons. These establishments often serve alcoholic beverages. Establishments in which sales of alcoholic beverages for consumption on the premises exceed receipts from sales of prepared foods and nonalcoholic beverages are classified as "Drinking places."

Fast Food:

Establishments primarily selling limited lines of refreshments and prepared food items. Included in this group are establishments which prepare refreshment items such as pizza, barbecued chicken, and hamburgers for consumption either on or near the premises or for "take home" consumption.

Market Share:

Represents the percent of eating places from fast food

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The maturing of the market has brought about a renewed interest in expansion of menu items and opportunities for increasing lunch and breakfast business.

units or from restaurants. It is indicative of customer preference for these types of establshments in that area.

Restaurant Activity Index (RAI):

The percent of U.S. eating place sales divided by the percent of U.S. food store sales, expressed as an index. An index greater than 100 indicates more than average propensity to eat out rather than at home.

Restaurant Growth Index (RGI):

The RGI is designed to show the relationship between retaurant supply and demand in each market as an index. When supply equals demand, the index is 100. When demand exceeds supply, and the potential for growth is present, the index will exceed 100. The amount by which the RGI exceeds 100 represents the proportion of growth potential that is present—an index of 120 means that the market's demand could support 20 percent growth. When the market is saturated, and supply exceeds demand, the index will drop below 100.

Demand is measured by six factors:

- Market's share of U.S. employed persons
- Market's share of U.S. working women
- Market's share of U.S. households with effective buying income of $25,000 or more
- Market's share of U.S. eating place sales
- Market's share of U.S. hotel and motel receipts
- Market's share of U.S. population age 14 & under; 25 to 44

These factors are given equal weight and added together to create the demand portion of the equation (i.e., $A+B+C+D+E+F \div 6$).

Supply is measured by the percentage of U.S. total eating places located in the market.

The RGI is created by dividing demand by supply, and multiplying the result by 100, so that the final figure will be in index form.

Television Market:

The TV markets are the American Research Bureau's Areas of Dominant Influence (ADIs). ARB studies each county for its measurable viewing patterns. The hours of viewing accorded each TV station whose signal reached the county are totalled; then each station's percentage share of total viewing hours is calculated. The market of origin of the TV stations with the largest share of viewing hours becomes the ADI name for that market, and all counties whose largest viewing share is given to stations of that same market of origin are grouped within the ADI. (For its purposes, ARB splits certain counties, treating each portion as if it were a separate county.) Each county (or portion) is allocated exclusively to a single ADI; thus overlap is eliminated. All of the area of the United States is covered except for Hawaii and part of Alaska.

Metropolitan Statistical Areas (MSAs):

In the Restaurant Growth Index, metropolitan markets are identical with Federal government's definition of MSAs or PMSAs (Primary Metropolitan Statistical Area), except in New England, where NECMAs (New England County Metropolitan Areas) are used. These metropolitan markets are counties or groups of counties which meet certain criteria of metropolitan character.

The basic criteria for metropolitan areas are:

1. Each metropolitan statistical area must include a city which, with contiguous and densely settled territory, constitutes a Census Bureau defined urbanized area with at least 50,000 population.
2. If a metropolitan statistical area's largest city has less than 50,000 population, the area must have a total population of at least 100,000.

Thus, a city of 50,000 or an urbanized area surrounding a city with 50,000 and a population density of 1,000 per square mile becomes a basic test of the metropolitan character of an area. The county or counties in which the city or urbanized area is located, plus surrounding counties with heavy commuting between themselves and the core counties and population density sufficient to establish them as metropolitan, are designated as the metropolitan area.

Certain areas meet many tests of metropolitan character, but are located within larger, dominating metropolitan statistical areas of one million or more population. To preserve the identity of these areas within the large, "mega-metropolitan areas," the government devised a second level of metropolitan criteria. These criteria identify, within metropolitan areas of at least one million population, sub-areas that are called Primary Metropolitan Statstical Areas (PMSAs). A county or counties that express strong local opinion to be identified as a PMSA must have:

1. At least 100,000 population
2. At least 60 percent of its population urban
3. Less than 50 percent of its resident workers commuting to jobs outside the county.

The Restaurant Growth Index treats MSAs and PMSAs as equivalent areas, so that the most locally identifiable area that qualifies as metropolitan will be the one appearing in the statistical tables.

In New England, the offical MSA definitions are based on cities and towns rather than counties. Because the Restaurant Growth Index is developed from a county level data base, we use New England County Metropolitan Areas (NECMAs) in the six New England states. NECMAs are determined by using the MSA standards as described above. □

Jeffrey Hall, formerly director of marketing of Market Statistics, is a consultant to Restaurant Business *Magazine.* *All data are copyrighted by* Restaurant Business *Magazine and* Sales & Marketing Management *Magazine and further reproduction without permission is prohibited.*

Metropolitan Statistical Areas

The following list shows the definitions of each metropolitan area as covered in the Restaurant Growth Index and defined by the Federal government.

Abilene, TX—Taylor
Akron, OH—Portage, Summit
Albany, GA—Dougherty, Lee
Albany-Schenectady-Troy, NY—Albany, Greene, Montgomery, Renselaer, Saratoga, Schenectady
Albuquerque, NM—Bernalillo
Alexandria, LA—Rapides
Allentown-Bethlehem, PA-NJ—Carbon, Pennsylvania; Lehigh, Pennsylvania; Northampton, Pennsylvania; Warren, New Jersey
Alton-Granite City, IL—Jersey, Madison
Altoona, PA—Blair
Amarillo, TX—Potter, Randall
Anaheim-Santa Ana, CA—Orange
Anchorage, AK—Anchorage Borough
Anderson, IN—Madison
Anderson, SC—Anderson
Ann Arbor, MI—Washtenaw
Anniston, AL—Calhoun
Appleton-Oshkosh-Neenah, WI—Calumet, Outagamie, Winnebago
Asheville, NC—Buncombe
Athens, GA—Clarke, Jackson, Madison, Oconee
Atlanta, GA—Barrow, Butts, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Newton, Paulding, Rockdale, Spalding, Walton
Atlantic City, NJ—Atlantic, Cape May
Augusta, GA-SC—Columbia, McDuffie, GA; Richmond, GA; Aiken, SC
Aurora-Elgin, IL—Kane, Kendall
Austin, TX—Hays, Travis, Williamson
Bakersfield, CA—Kern
Baltimore, MD—Anne Arundel, Baltimore, Carroll, Harford, Howard, Queen Anne's, Baltimore
Bangor, ME—Penobscot
Baton Rouge, LA—Ascension, East Baton Rouge, Livingston, West Baton Rouge
Battle Creek, MI—Calhoun
Beaumont-Port Arthur, TX—Hardin, Jefferson, Orange
Beaver County, PA—Beaver
Bellingham, WA—Whatcom
Benton Harbor,MI—Berrien
Bergen-Passaic, NJ—Bergen, Passaic
Billings, MT—Yellowstone
Biloxi-Gulfport, MS—Hancock, Harrison
Binghamton, NY—Broome, Tioga
Birmingham, AL—Blount, Jefferson, St. Clair, Shelby, Walker
Bismarck, ND—Burleigh, Morton
Bloomington, IN—Monroe
Bloomington-Normal, IL—McLean
Boise City, ID—Ada
Boston-Lawrence-Salem-Lowell-Brockton, MA—Essex, Middlesex, Norfolk, Plymouth, Suffolk
Boulder-Longmont, CO—Boulder
Bradenton, FL—Manatee
Brazoria, TX—Brazoria
Bremerton, WA—Kitsap
Bridgeport-Stamford-Norwalk-Danbury, CT—Fairfield
Brownsville-Harlingen, TX—Cameron
Bryan-College Station, TX—Brazos
Buffalo, NY—Erie
Burlington, NC—Alamance
Burlington, VT—Chittenden, Grand Isle
Canton, OH—Carroll, Stark
Casper, WY—Natrona
Cedar Rapids, IA—Linn
Champaign-Urbana-Rantoul, IL—Champaign
Charleston, SC—Berkeley, Charleston, Dorchester
Charleston, WV—Kanawha, Putnam
Charlotte-Gastonia-Rock Hill, NC-SC—Cabarrus, Gaston, Lincoln, Mecklenburg, Rowan, Union, all NC; York, SC
Charlottesville, VA—Albemarle, Fluvanna, Greene, Charlottesville
Chattanooga, TN-GA—Hamilton, TN; Marion, TN; Sequatchie, TN; Catoosa, GA; Dade, GA; Walker, GA
Chicago, IL—Cook, DuPage, McHenry
Chico, CA—Butte
Cincinnati, OH-KY-IN—Clermont, OH; Hamilton, OH; Warren, OH; Boone, KY; Campbell, KY; Kenton, KY; Dearborn, IN
Clarksville-Hopkinsville, TN-KY—Montgomery, TN; Christian, KY
Cleveland, OH—Cuyahoga, Geauga, Lake, Medina
Colorado Springs, CO—El Paso
Columbia, MO—Boone
Columbia, SC—Lexington, Richland
Columbus, GA-AL—Chattahoochee, GA; Muscogee, GA; Russell, AL
Columbus, OH—Delaware, Fairfield, Franklin, Licking, Madison, Pickaway, Union
Corpus Christi, TX—Nueces, San Patricio
Cumberland, MD-WV—Allegany, MD; Mineral, WV
Dallas, TX—Collin, Dallas, Denton, Ellis, Kaufman, Rockwall
Danville, VA—Pittsylvania, Danville
Davenport-Rock Island-Moline, IA-IL—Scott, IA; Henry, IL; Rock Island, IL
Dayton-Springfield, OH—Clark, Greene, Miami, Montgomery
Daytona Beach, FL—Volusia
Decatur, IL—Macon
Denver, CO—Adams, Arapahoe, Denver, Douglas, Jefferson
Des Moines, IA—Dallas, Polk, Warren
Detroit, MI—Lapeer, Livingston, Macomb, Monroe, Oakland, St. Clair, Wayne
Dothan, AL—Dale, Houston
Dubuque, IA—Dubuque
Duluth, MN-WI—St. Louis, MN; Douglas, WI
East St. Louis-Belleville, IL—Clinton, St. Clair
Eau Claire, WI—Chippewa, Eau Claire
El Paso, TX—El Paso
Elkhart-Goshen, IN—Elkhart
Elmira, NY—Chemung
Enid, OK—Garfield
Erie, PA—Erie
Eugene-Springfield, OR—Lane
Evansville, IN-KY—Posey, IN; Vanderburgh, IN; Warrick, IN; Henderson, KY
Fargo-Moorehead, ND-MN—Cass, ND; Clay, MN
Fayetteville, NC—Cumberland
Fayetteville-Springdale, AR—Washington
Flint, MI—Genesee
Florence, AL—Colbert, Lauderdale
Florence, SC—Florence
Fort Collins-Loveland, CO—Larimer
Fort Lauderdale-Hollywood-Pompano Beach, FL—Broward
Fort Myers, FL—Cape Coral, Lee
Fort Pierce, FL—Martin, St. Lucie
Fort Smith, AR-OK—Crawford, Sebastian, AR; Sequoyah, OK
Fort Walton Beach, FL—Okaloosa
Fort Wayne, IN—Allen, De Kalb, Whitley
Fort Worth-Arlington, TX—Johnson, Parker, Tarrant
Fresno, CA—Fresno
Gadsden, AL—Etowah
Gainesville, FL—Alachua, Bradford
Galveston-Texas City, TX—Galveston
Gary-Hammond, IN—Lake, Porter
Glens Falls, NY—Warren, Washington
Grand Forks, ND—Grand Forks
Grand Rapids, MI—Kent, Ottawa
Great Falls, MT—Cascade
Greeley, CO—Weld

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Green Bay, WI—Brown
Greensboro-Winston-Salem-High Point, NC—Davidson, Davie, Forsyth, Guilford, Randolph, Stokes, Yadkin
Greenville-Spartanburg, SC—Greenville, Pickens, Spartanburg
Hagerstown, MD—Washington
Hamilton-Middletown, OH—Butler
Harrisburg-Lebanon-Carlisle, PA—Cumberland, Dauphin, Lebanon, Perry
Hartford-New Britain-Middletown-Bristol, CT—Hartford, Middlesex, Tolland
Hickory, NC—Alexander, Burke, Catawba
Honolulu, HI—Honolulu
Houma-Thibodaux, LA—Lafourche, Terrebonne
Houston, TX—Fort Bend, Harris, Liberty, Montgomery, Waller
Huntington-Ashland, WV-KY-OH—Cabell, WV; Wayne, WV; Boyd, KY; Carter, KY; Greenup, KY; Lawrence, OH
Huntsville, AL—Madison
Indianapolis, IN—Boone, Hamilton, Hancock, Hendricks, Johnson, Marion, Morgan, Shelby
Iowa City, IA—Johnson
Jackson, MI—Jackson
Jackson, MS—Hinds, Madison, Rankin
Jacksonville, FL—Clay, Duval, Nassau, St. Johns
Jacksonville, NC—Onslow
Janesville-Beloit, WI—Rock
Jersey City, NJ—Hudson
Johnson City-Kingsport-Bristol, TN-VA—Carter, TN; Hawkins, TN; Sullivan, TN; Unicoi, TN; Washington, TN; Scott, VA; Washington, VA; Bristol, VA
Johnstown, PA—Cambria, Somerset
Joliet, IL—Grundy, Will
Joplin, MO—Jasper, Newton
Kalamazoo, MI—Kalamazoo
Kankakee, IL—Kankakee
Kansas City, MO-KS (recombined)—Cass, Clay, Jackson, Lafayette, Platte, Ray, all MO; Johnson, Leavenworth, Miami, Wyandotte, all KS.
Kenosha, WI—Kenosha
Killeen-Temple, TX—Bell, Coryell
Knoxville, TN—Anderson, Blount, Grainger, Jefferson, Knox, Sevier, Union
Kokomo, IN—Howard, Tipton
La Crosse, WI—La Crosse
Lafayette, LA—Lafayette, St. Martin
Lafayette, IN—Tippecanoe
Lake Charles, LA—Calcasieu
Lake County, IL—Lake
Lakeland-Winter Haven, FL—Polk
Lancaster, PA—Lancaster
Lansing-East Lansing, MI—Clinton, Eaton, Ingham
Laredo, TX—Webb
Las Cruces, NM—Dona Ana
Las Vegas, NV—Clark
Lawrence, KS—Douglas
Lawton, OK—Comanche
Lewiston-Auburn, ME—Androscoggin
Lexington-Fayette, KY—Bourbon, Clark, Fayette, Jessamine, Scott, Woodford
Lima, OH—Allen, Auglaize
Lincoln, NE—Lancaster
Little Rock-North Little Rock, AR—Faulkner, Lonoke, Pulaski, Saline
Longview-Marshall, TX—Gregg, Harrison
Lorain-Elyria, OH—Lorain
Los Angeles-Long Beach, CA—Los Angeles
Louisville, KY-IN—Bullitt, KY; Jefferson, KY; Oldham, KY; Shelby, KY; Clark, IN; Floyd, IN; Harrison, IN
Lubbock, TX—Lubbock
Lynchburg, VA—Amherst, Campbell, Lynchburg
Macon-Warner Robins, GA—Bibb, Houston, Jones, Peach
Madison, WI—Dane
Manchester, NH—Hillsborough
Mansfield, OH—Richland
McAllen-Endinburg-Mission, TX—Hidalgo
Medford, OR—Jackson
Melbourne-Titusville-Palm Bay, FL—Brevard
Memphis, TN-AR-MS—Shelby, TN; Tipton, TN; Crittenden, AR; De Soto, MS
Miami-Hialeah, FL—Dade
Middlesex-Somerset-Hunterdon, NJ—Hunterdon, Middlesex, Somerset
Midland, TX—Midland
Milwaukee, WI—Milwaukee, Ozaukee, Washington, Waukesha
Minneapolis-St. Paul, MN-WI—Anoka, MN; Carver, MN; Chisago, MN; Dakota, MN; Hennepin, MN; Isanti, MN; Ramsey, MN; Scott, MN; Washington, MN; Wright, MN; St. Croix, WI
Mobile, AL—Baldwin, Mobile
Modesto, CA—Stanislaus
Monmouth-Ocean, NJ—Monmouth, Ocean
Monroe, LA—Ouachita
Montgomery, AL—Autauga, Elmore, Montgomery
Muncie, IN—Delaware
Muskegon, MI—Muskegon
Naples, FL—Collier
Nashville, TN—Cheatham, Davidson, Dickson, Robertson, Rutherford, Sumner, Williamson, Wilson
Nassau-Suffolk, NY—Nassau, Suffolk
New Bedford-Fall River-Attleboro, MA—Bristol
New Haven-Waterbury-Meriden, CT—New Haven
New London-Norwich, CT—New London
New Orleans, LA—Jefferson, Orleans, St. Bernard, St. Charles, St. John the Baptist, St. Tammany
New York, NY—Bronx, Kings, New York, Putnam, Queens, Richmond, Rockland, Westchester
Newark, NJ—Essex, Morris, Sussex, Union
Niagara Falls, NY—Niagara
Norfolk-Virginia Beach-Newport News, VA—Gloucester, James City, York, Chesapeake, Hampton, Newport News, Norfolk, Poquoson, Portsmouth, Suffolk, Virginia Beach, Williamsburg
Oakland, CA—Alameda, Contra Costa
Ocala, FL—Marion
Odessa, TX—Ector
Oklahoma City, OK—Canadian, Cleveland, Logan, McClain, Oklahoma, Pottawatomie
Olympia, WA—Thurston
Omaha, NE-IA—Douglas, NE; Sarpy, NE; Washington, NE; Pottawattamie, IA
Orange County, NY—Orange
Orlando, FL—Orange, Osceola, Seminole
Owensboro, KY—Daviess
Oxnard-Ventura, CA—Ventura
Panama City, FL—Bay
Parkersburg-Marietta, WV-OH—Wood, WV; Washington, OH
Pascagoula, MS—Jackson
Pensacola, FL—Escambia, Santa Rosa
Peoria, IL—Peoria, Tazewell, Woodford
Philadelphia, PA-NJ—Bucks, PA; Chester, PA; Delaware, PA; Montgomery, PA; Philadelphia, PA; Burlington, NJ; Camden, NJ; Gloucester, NJ
Phoenix, AZ—Maricopa
Pine Bluff, AR—Jefferson
Pittsburgh, PA—Allegheny, Fayette, Washington, Westmoreland
Pittsfield, MA—Berkshire
Portland, ME—Cumberland
Portland, OR—Clackamas, Multnomah, Washington, Yamhill
Portsmouth-Dover-Rochester, NH—Rockingham, Strafford
Poughkeepsie, NY—Dutchess
Providence-Pawtucket-Woonsocket, RI—Bristol, Kent, Providence, Washington
Provo-Orem, UT—Utah
Pueblo, CO—Pueblo
Racine, WI—Racine
Raleigh-Durham, NC—Durham, Franklin, Orange, Wake
Reading, PA—Berks
Redding, CA—Shasta
Reno, NV—Washoe
Richland-Kennewick-Pasco, WA—Benton, Franklin
Richmond-Petersburg, VA—Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent, Pawhatan, Prince George, Colonial Heights, Hopewell, Petersburg, Richmond
Riverside-San Bernardino, CA—Riverside, San Bernardino
Roanoke, VA—Botetourt, Roanoke County, Roanoke City, Salem
Rochester, MN—Olmstead
Rochester, NY—Livingston, Monroe, Ontario, Orleans, Wayne
Rockford, IL—Boone, Winnebago
Sacramento, CA—El Dorado, Placer, Sacramento, Yolo
Saginaw-Bay City-Midland, MI—Bay, Midland, Saginaw
Santa Fe, NM—Los Alamos, Santa Fe
St. Cloud, MN—Benton, Sherburne, Stearns
St. Joseph, MO—Buchanan
St. Louis, MO-IL—Franklin, MO; Jefferson, MO; St. Charles, MO; St. Louis County, MO; St. Louis City, MO; Monroe, IL
Salem, OR—Marion, Polk
Salinas-Seaside-Monterey, CA—Monterey
Salt Lake City-Ogden, UT—Davis, Salt Lake, Weber
San Angelo, TX—Tom Green
San Antonio, TX—Bexar, Comal, Guadalupe
San Diego, CA—San Diego
San Francisco, CA—Marin, San Francisco, San Mateo
San Jose, CA—Santa Clara
Santa Barbara-Santa Maria-Lompoc, CA—Santa Barbara
Santa Cruz, CA—Santa Cruz
Santa Rosa-Petaluma, CA—Sonoma
Sarasota, FL—Sarasota
Savannah, GA—Chatham, Effingham
Scranton-Wilkes-Barre, PA—Columbia, Lackawanna, Luzerne, Monroe, Wyoming
Seattle, WA—King, Snohomish
Sharon, PA—Mercer
Sheboygan, WI—Sheboygan
Sherman-Denison, TX—Grayson
Shreveport, LA—Bossier, Caddo
Sioux City, IA-NE—Woodbury, IA, Dako-

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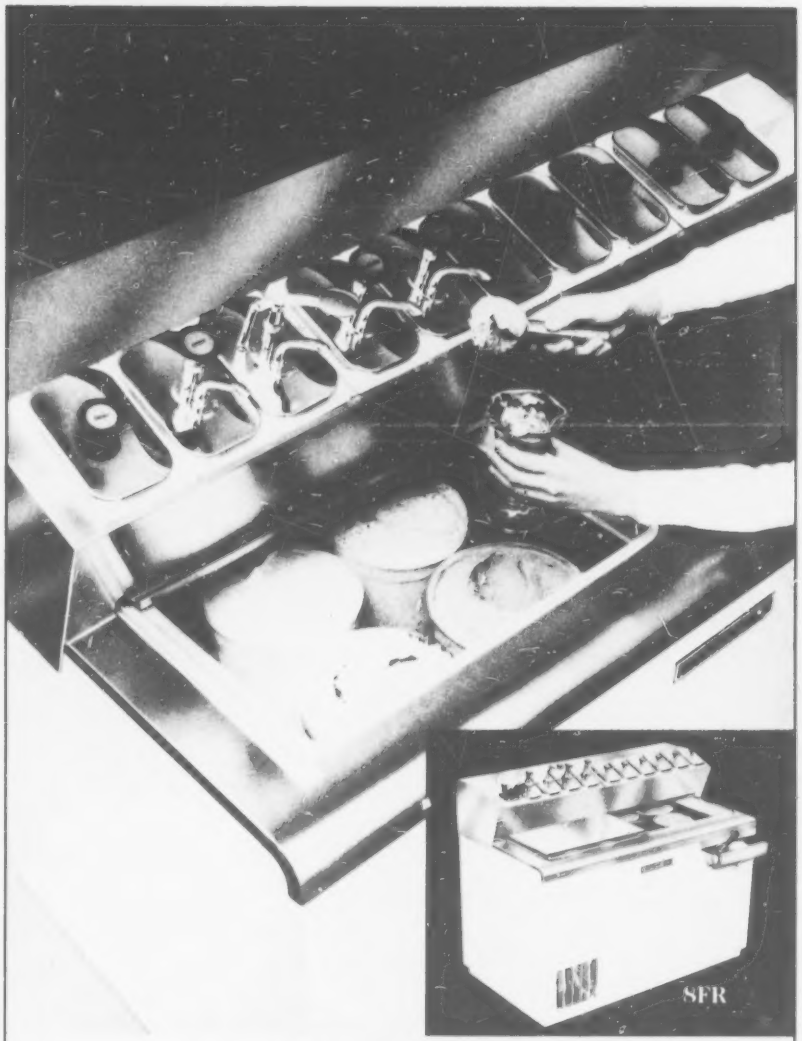
ta, NE
Sioux Falls, SD—Minnehaha
South Bend-Mishawaka, IN—St. Joseph
Spokane, WA—Spokane
Springfield, IL—Menard, Sangamon
Springfield, MA—Hampden, Hampshire
Springfield, MO—Christian, Greene
State College, PA—Centre
Steubenville-Weirton, OH-WV—Jefferson, OH; Brooke, WV; Hancock, WV
Stockton, CA—San Joaquin
Syracuse, NY—Madison, Onondaga, Oswego
Tacoma, WA—Pierce
Tallahassee, FL—Gadsden, Leon
Tampa-St. Petersburg-Clearwater, FL—Hernando, Hillsborough, Pasco, Pinellas
Terre Haute, IN—Clay, Vigo
Texarkana, TX-Texarkana, AR—Bowie, TX; Miller, AR
Toledo, OH—Fulton, Lucas, Wood
Topeka, KS—Shawnee
Trenton, NJ—Mercer
Tucson, AZ—Pima
Tulsa, OK—Creek, Osage, Rogers, Tulsa, Wagoner
Tuscaloosa, AL—Tuscaloosa
Tyler, TX—Smith
Utica-Rome, NY—Herkimer, Oneida
Vallejo-Fairfield-Napa, CA—Napa, Solano
Vancouver, WA—Clark
Victoria, TX—Victoria
Vineland-Millville-Bridgeton, NJ—Cumberland
Visalia-Tulare-Porterville, CA—Tulare
Waco, TX—McLennan
Washington, DC-MD-VA—District of Columbia; Calvert, MD; Charles, MD; Frederick, MD; Montogomery, MD; Prince George's, MD; Arlington, VA; Fairfax, VA; Loudon, VA; Prince William, VA; Stafford, VA; Alexandria, VA; Fairfax, VA; Falls Church, VA; Manassas, VA; Manassas Park, VA
Waterloo-Cedar Falls, IA—Black Hawk, Bremer
Wausau, WI—Marathon
West Palm Beach-Boca Raton-Delray Beach, FL—Palm Beach
Wheeling, WV-OH—Marshall, WV; Ohio, WV; Belmont, OH
Wichita, KS—Butler, Sedgwick
Wichita Falls, TX—Wichita
Williamsport, PA—Lycoming
Wilmington, DE-MD-NJ—New Castle, DE; Cecil, MD; Salem, NJ
Wilmington, NC—New Hanover
Worcester, MA—Worcester
Yakima, MA—Yakima
York, PA—Adams, York
Youngstown-Warren, OH—Mahoning, Trumbull
Yuba City, CA—Sutter, Yuba □



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For information circle number 142

RGI Regional Summary

REGION State	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Connecticut	3,133.1	1.3303	2.78	1,971,635	1,768,759	549,857	31	1,088,313	62	110	92
Maine	1,154.2	0.4901	2.75	555,507	532,812	182,219	34	310,961	58	91	84
Massachusetts	5,764.9	2.4477	2.74	3,801,826	3,421,144	940,417	27	2,229,394	65	110	100
New Hampshire	964.5	0.4095	2.79	548,812	531,639	148,846	28	343,127	65	90	93
Rhode Island	954.3	0.4052	2.72	555,747	489,967	150,007	31	303,677	62	114	84
Vermont	528.9	0.2245	2.78	313,520	282,616	75,832	27	185,312	66	102	94
NEW ENGLAND	**12,499.9**	**5.3073**	**2.75**	**7,747,047**	**7,026,937**	**2,047,178**	**29**	**4,460,784**	**63**	**107**	**94**
New Jersey	7,484.6	3.1778	2.81	3,764,725	3,079,218	961,646	31	1,887,439	61	78	116
New York	17,740.7	7.5325	2.72	8,133,838	7,226,831	2,105,834	29	4,580,907	63	88	96
Pennsylvania	11,916.6	5.0596	2.72	4,997,064	4,276,817	1,563,541	37	2,390,617	56	88	100
MIDDLE ATLANTIC	**37,141.9**	**15.7699**	**2.74**	**16,895,627**	**14,582,866**	**4,631,021**	**32**	**8,858,963**	**61**	**86**	**101**
Illinois	11,511.2	4.8874	2.72	5,934,115	5,261,510	2,025,313	38	2,839,609	54	111	100
Indiana	5,526.3	2.3464	2.82	2,603,695	2,345,041	1,112,725	47	1,044,254	45	101	87
Michigan	9,129.3	3.8761	2.83	3,997,772	3,492,861	1,324,997	38	1,901,765	54	93	95
Ohio	10,767.4	4.5717	2.69	5,491,125	4,857,371	2,098,424	43	2,387,524	49	101	91
Wisconsin	4,766.1	2.0236	2.74	2,608,243	2,061,439	668,373	32	1,239,997	60	111	90
EAST NORTH CENTRAL	**41,700.3**	**17.7052**	**2.75**	**20,634,950**	**18,018,222**	**7,229,832**	**40**	**9,413,149**	**52**	**103**	**94**
Iowa	2,934.0	1.2458	2.65	1,290,954	1,082,037	455,178	42	539,733	50	83	77
Kansas	2,430.2	1.0318	2.63	1,032,708	969,783	471,592	49	421,974	44	98	75
Minnesota	4,168.4	1.7699	2.77	2,061,060	1,783,267	566,377	32	1,081,280	61	97	104
Missouri	4,990.3	2.1189	2.71	2,214,287	2,042,556	916,900	45	964,016	47	85	90
Nebraska	1,603.4	0.6808	2.70	781,336	646,376	258,914	40	336,251	52	94	79
North Dakota	687.0	0.2916	2.81	326,131	255,717	97,309	38	137,992	54	107	87
South Dakota	705.8	0.2996	2.72	324,735	264,380	86,237	33	157,701	60	91	76
WEST NORTH CENTRAL	**17,519.1**	**7.4384**	**2.70**	**8,031,211**	**7,044,116**	**2,852,507**	**40**	**3,638,947**	**52**	**91**	**86**
Delaware	608.3	0.2583	2.83	290,894	262,806	104,814	40	137,955	52	96	97
District of Columbia	618.4	0.2625	2.49	560,855	505,124	144,907	29	321,726	64	240	159
Florida	10,815.5	4.5921	2.57	6,129,146	5,616,694	2,029,790	36	3,139,029	56	122	113
Georgia	5,777.4	2.4530	2.87	2,445,967	2,293,148	1,165,767	51	942,991	41	101	105
Maryland	4,327.7	1.8375	2.83	2,089,515	1,852,105	787,218	43	922,558	50	90	106
North Carolina	6,120.3	2.5986	2.78	2,505,693	2,425,138	1,242,573	51	988,169	41	98	92
South Carolina	3,306.8	1.4040	2.90	1,173,388	1,122,698	585,958	52	448,260	40	95	105
Virginia	5,583.5	2.3707	2.83	2,373,918	2,318,106	1,045,253	45	1,093,182	47	93	104
West Virginia	1,973.5	0.8380	2.76	571,045	532,738	280,932	53	209,826	39	55	96
SOUTH ATLANTIC	**39,131.4**	**16.6147**	**2.75**	**18,140,421**	**16,928,557**	**7,387,212**	**44**	**8,203,696**	**48**	**103**	**106**
Alabama	3,990.4	1.6943	2.79	1,287,668	1,223,260	708,510	58	416,962	34	78	99
Kentucky	3,753.2	1.5935	2.78	1,432,651	1,347,574	743,023	55	495,628	37	73	99
Mississippi	2,605.1	1.1060	2.96	671,800	640,426	350,043	55	240,161	38	58	98
Tennessee	4,719.8	2.0040	2.79	2,122,294	2,038,781	969,899	48	905,053	44	99	101
EAST SOUTH CENTRAL	**15,068.5**	**6.3978**	**2.82**	**5,514,413**	**5,250,041**	**2,771,475**	**53**	**2,057,804**	**39**	**80**	**99**
Arkansas	2,350.1	0.9979	2.78	715,119	692,409	382,794	55	253,791	37	72	77
Louisiana	4,471.7	1.8986	2.86	2,013,953	1,814,069	866,965	48	805,606	44	90	120
Oklahoma	3,345.6	1.4205	2.69	1,621,403	1,551,531	791,257	51	635,638	41	107	80
Texas	15,896.8	6.7495	2.84	8,400,488	7,577,109	3,436,412	45	3,517,143	46	100	101
WEST SOUTH CENTRAL	**26,064.2**	**11.0665**	**2.82**	**12,750,963**	**11,635,118**	**5,477,428**	**47**	**5,212,178**	**45**	**97**	**99**
Arizona	3,020.5	1.2824	2.69	1,540,070	1,367,785	494,380	36	768,651	56	100	101
Colorado	3,183.5	1.3516	2.63	1,965,416	1,763,305	570,366	32	1,056,184	60	110	100
Idaho	1,003.5	0.4261	2.88	430,085	373,899	138,230	37	206,177	55	78	85
Montana	822.6	0.3492	2.66	517,456	377,595	128,398	34	219,998	58	88	82
Nevada	904.6	0.3841	2.52	550,405	463,083	161,410	35	266,960	58	106	586
New Mexico	1,416.7	0.6015	2.85	702,949	631,381	262,943	42	316,592	50	98	88
Utah	1,642.4	0.6974	3.26	596,413	568,012	251,211	44	273,945	48	90	89
Wyoming	517.5	0.2197	2.72	329,620	261,133	99,050	38	140,859	54	103	141
MOUNTAIN	**12,511.3**	**5.3120**	**2.76**	**6,632,414**	**5,806,193**	**2,105,988**	**36**	**3,249,366**	**56**	**99**	**130**
Alaska	499.6	0.2121	2.94	464,445	348,783	130,397	37	192,930	55	120	160
California	25,332.3	10.7557	2.70	16,866,588	15,540,772	5,307,457	34	9,022,036	58	119	98
Hawaii	1,033.4	0.4388	3.17	975,329	890,944	289,939	33	534,770	60	200	176
Oregon	2,675.7	1.1361	2.59	1,502,609	1,329,553	478,206	36	746,779	56	117	80
Washington	4,346.7	1.8455	2.62	2,571,465	2,291,693	749,647	33	1,363,954	60	112	94
PACIFIC	**33,887.7**	**14.3882**	**2.70**	**22,380,436**	**20,401,745**	**6,955,646**	**34**	**11,860,469**	**58**	**120**	**100**
United States Total	**235,524.3**	**100.0000**	**2.75**	**118,727,482**	**106,693,795**	**41,458,287**	**39**	**56,955,356**	**53**	**100**	**100**

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Sales by Metropolitan Area

This segment of the Restaurant Growth Index shows 316 Metropolitan Statistical Areas (MSAs) as defined by the U.S. Office of Federal Statistical Policy and Standards.

STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
ALABAMA											
Anniston	122.8	0.0521	2.90	44,603	43,089	25,083	58	14,490	34	92	98
Birmingham	905.5	0.3845	2.70	358,930	338,565	186,063	55	123,886	37	89	100
Dothan	125.8	0.0535	2.85	43,249	42,218	26,130	62	13,676	32	86	90
Florence	138.4	0.0587	2.72	40,677	40,677	23,678	58	13,679	34	62	83
Gadsden	104.3	0.0443	2.72	37,082	35,124	20,450	58	11,810	34	88	75
Huntsville	199.2	0.0846	2.74	118,332	110,373	63,965	58	38,312	35	155	128
Mobile	461.4	0.1959	2.83	177,959	163,194	93,629	57	55,080	34	93	105
Montgomery	287.0	0.1218	2.84	128,780	122,605	69,585	57	38,669	32	116	117
Tuscaloosa	142.3	0.0604	2.83	54,961	52,677	30,665	58	17,714	34	101	96
Non-Metro Portion of State	1,456.9	0.6186	2.84	271,390	263,678	162,828	62	85,928	33	46	91
State Total	**3,990.4**	**1.6943**	**2.79**	**1,287,668**	**1,223,260**	**708,510**	**58**	**416,962**	**34**	**78**	**99**
ALASKA											
Anchorage	217.5	0.0924	2.75	240,825	190,410	80,270	42	104,684	55	133	158
Non-Metro Portion of State	282.1	0.1197	3.10	223,620	158,373	50,127	32	88,246	56	108	162
State Total	**499.6**	**0.2121**	**2.94**	**464,445**	**348,783**	**130,397**	**37**	**192,930**	**55**	**120**	**160**
ARIZONA											
Phoenix	1,681.8	0.7141	2.63	966,384	869,839	315,521	36	476,700	55	109	115
Tucson	590.1	0.2506	2.58	279,779	246,847	98,753	40	132,028	53	91	90
Non-Metro Portion of State	748.6	0.3177	2.97	293,907	251,099	80,106	32	159,923	64	85	81
State Total	**3,020.5**	**1.2824**	**2.69**	**1,540,070**	**1,367,785**	**494,380**	**36**	**768,651**	**56**	**100**	**101**
ARKANSAS											
Fayetteville - Springdale	104.6	0.0445	2.75	48,812	47,264	26,920	57	16,769	35	108	65
Fort Smith	173.2	0.0735	2.76	83,755	81,192	45,706	56	29,314	36	100	82
Little Rock - North Little Rock	494.9	0.2101	2.79	195,862	191,038	105,932	55	69,086	36	95	102
Pine Bluff	89.4	0.0379	2.95	24,597	23,673	13,486	57	8,401	35	70	74
Texarkana	118.4	0.0503	2.75	51,466	49,228	24,116	49	21,167	43	71	72
Non-Metro Portion of State	1,436.2	0.6098	2.78	345,387	334,150	181,646	54	125,508	38	59	68
State Total	**2,350.1**	**0.9979**	**2.78**	**715,119**	**692,409**	**382,794**	**55**	**253,791**	**37**	**72**	**77**
CALIFORNIA											
Anaheim - Santa Ana	2,129.4	0.9041	2.73	1,623,210	1,539,702	530,730	34	921,057	60	136	102
Bakersfield	443.4	0.1883	2.83	260,089	238,976	87,369	37	135,262	57	90	91
Chico	160.3	0.0681	2.49	85,628	75,876	26,060	34	46,961	62	96	73
Fresno	555.2	0.2357	2.82	272,232	245,650	102,602	42	132,970	54	86	76
Los Angeles - Long Beach	7,719.1	3.2774	2.73	5,190,182	4,845,133	1,590,927	33	2,800,939	58	126	102
Modesto	293.4	0.1245	2.76	159,590	145,869	63,936	44	70,906	49	98	87
Oakland	1,847.6	0.7844	2.58	1,119,957	1,019,527	362,664	36	563,414	55	108	99
Oxnard - Ventura	589.8	0.2504	2.98	292,045	271,920	109,305	40	153,604	56	86	104
Redding	131.4	0.0558	2.62	55,156	46,498	15,965	34	28,763	62	61	67

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STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
CALIFORNIA *continued*											
Riverside - San Bernardino	1,751.6	0.7437	2.79	909,197	835,749	345,823	41	434,928	52	104	88
Sacramento	1,217.5	0.5168	2.55	823,175	754,053	269,813	36	426,845	57	111	90
Salinas - Seaside - Monterey	316.5	0.1343	3.00	214,172	198,994	51,786	26	134,378	68	144	99
San Diego	2,036.1	0.8645	2.72	1,281,599	1,167,538	445,134	38	663,868	57	127	109
San Francisco	1,507.2	0.6400	2.39	1,698,629	1,529,232	394,966	26	967,270	63	164	112
San Jose	1,390.9	0.5906	2.73	1,094,271	1,012,621	371,645	37	548,518	54	127	120
Santa Barbara - Santa Maria - Lompoc	316.4	0.1343	2.67	257,391	242,434	65,799	27	164,693	68	155	88
Santa Cruz	215.1	0.0913	2.62	144,049	132,688	46,213	35	78,891	59	107	69
Santa Rosa - Petaluma	335.0	0.1423	2.55	212,109	188,856	60,077	32	112,824	60	96	85
Stockton	379.2	0.1610	2.74	201,848	179,535	67,555	38	99,353	55	92	76
Vallejo - Fairfield - Napa	372.8	0.1583	2.79	202,246	182,703	62,986	34	111,380	61	99	93
Visalia - Tulare - Porterville	272.9	0.1159	3.03	91,967	82,235	28,247	34	50,868	62	60	80
Yuba City	109.6	0.0467	2.73	49,525	42,240	14,516	34	26,128	62	86	79
Non-Metro Portion of State	1,241.9	0.5273	2.74	628,321	562,743	193,339	34	348,216	62	88	71
State Total	**25,332.3**	**10.7557**	**2.70**	**16,866,588**	**15,540,772**	**5,307,457**	**34**	**9,022,036**	**58**	**119**	**98**
COLORADO											
Boulder - Longmont	212.5	0.0902	2.64	133,466	124,206	51,913	42	65,800	53	118	98
Colorado Springs	337.7	0.1434	2.77	166,365	153,107	71,897	47	74,519	49	105	102
Denver	1,580.1	0.6708	2.55	1,076,925	962,404	296,308	31	572,931	60	113	117
Fort Collins - Loveland	171.8	0.0729	2.71	88,627	83,591	27,334	33	49,843	60	112	90
Greeley	137.2	0.0582	2.82	49,611	42,878	14,022	33	25,564	60	87	92
Pueblo	126.7	0.0538	2.68	65,270	54,384	17,783	33	32,427	60	93	82
Non-Metro Portion of State	617.5	0.2623	2.71	385,152	342,735	91,109	27	235,100	69	110	78
State Total	**3,183.5**	**1.3516**	**2.63**	**1,965,416**	**1,763,305**	**570,366**	**32**	**1,056,184**	**60**	**110**	**100**
CONNECTICUT											
Bridgeport - Stamford - Norwalk - Danbury	811.4	0.3445	2.83	528,348	476,972	118,724	25	325,945	68	107	95
Hartford - New Britain - Middletown - Bristol	1,054.8	0.4478	2.76	696,923	629,290	214,793	34	353,600	56	117	100
New Haven - Waterbury - Meriden	765.7	0.3252	2.75	475,209	430,965	145,349	34	260,530	60	112	80
New London - Norwich	244.3	0.1037	2.82	153,396	129,356	39,991	31	83,289	64	111	97
Non-Metro Portion of State	256.9	0.1091	2.78	117,759	102,176	31,000	30	64,949	64	82	77
State Total	**3,133.1**	**1.3303**	**2.78**	**1,971,635**	**1,768,759**	**549,857**	**31**	**1,088,313**	**62**	**110**	**92**
DELAWARE											
Wilmington	529.6	0.2248	2.84	235,161	210,046	83,506	40	112,567	54	96	109
Non-Metro Portion of State	208.3	0.0885	2.84	107,354	97,331	34,527	35	55,602	57	93	77
State Total	**608.3**	**0.2583**	**2.83**	**290,894**	**262,806**	**104,814**	**40**	**137,955**	**52**	**96**	**97**
DISTRICT OF COLUMBIA											
Washington	3,363.0	1.4277	2.72	1,998,069	1,891,490	696,017	37	1,040,240	55	117	136
State Total	**618.4**	**0.2625**	**2.49**	**560,855**	**505,124**	**144,907**	**29**	**321,726**	**64**	**240**	**159**
FLORIDA											
Bradenton	169.6	0.0720	2.41	108,920	99,246	35,961	36	55,302	56	145	85
Daytona Beach	291.4	0.1238	2.42	185,655	167,263	58,222	35	94,416	56	143	100
Fort Lauderdale - Hollywood - Pompano Beach	1,121.0	0.4760	2.42	848,325	780,764	224,438	29	506,943	65	170	106

continued on page 188

STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
FLORIDA *continued*											
Fort Myers - Cape Coral	244.1	0.1036	2.44	142,208	132,454	47,996	36	73,807	56	111	94
Fort Pierce	181.8	0.0772	2.55	82,123	74,598	29,912	40	41,892	56	96	93
Fort Walton Beach	117.2	0.0498	2.83	78,097	73,991	29,719	40	41,537	56	169	92
Gainesville	188.0	0.0799	2.75	107,859	101,519	37,049	36	56,533	56	132	98
Jacksonville	759.9	0.3226	2.71	369,415	344,404	173,311	50	146,165	42	118	107
Lakeland - Winter Haven	351.1	0.1491	2.77	154,959	145,081	65,743	45	65,985	45	105	90
Melbourne - Titusville - Palm Bay	300.7	0.1276	2.52	167,650	151,109	60,474	40	79,916	53	126	95
Miami - Hialeah	1,764.5	0.7491	2.73	961,564	888,379	270,708	30	520,315	59	121	139
Naples	106.1	0.0450	2.46	77,361	69,847	28,000	40	39,299	56	120	86
Ocala	145.3	0.0617	2.64	71,596	66,413	26,634	40	37,290	56	113	80
Orlando	804.5	0.3415	2.74	533,310	502,149	214,175	43	248,394	49	142	165
Panama City	104.9	0.0445	2.72	86,424	78,315	28,379	36	43,637	56	223	107
Pensacola	306.5	0.1301	2.82	152,906	130,973	66,373	51	52,047	40	112	114
Sarasota	233.5	0.0992	2.25	175,539	164,282	44,955	27	104,684	64	135	92
Tallahassee	204.6	0.0869	2.79	102,437	95,813	34,910	36	53,350	56	113	116
Tampa - St. Petersburg - Clearwater	1,787.8	0.7592	2.44	991,078	899,547	341,891	38	471,109	52	105	112
West Palm Beach - Boca Raton - Delray Beach	664.5	0.2821	2.41	431,378	384,029	103,919	27	256,565	67	132	122
Non-Metro Portion of State	968.5	0.4112	2.64	300,342	266,518	107,021	40	149,843	56	72	81
State Total	**10,815.5**	**4.5921**	**2.57**	**6,129,146**	**5,616,694**	**2,029,790**	**36**	**3,139,029**	**56**	**122**	**113**
GEORGIA											
Albany	117.1	0.0497	3.03	41,102	39,332	19,746	50	16,463	42	108	111
Athens	137.2	0.0583	2.78	59,838	56,736	31,813	56	21,806	38	120	90
Atlanta	2,320.0	0.9850	2.76	1,305,549	1,227,790	599,212	49	510,966	42	127	118
Augusta	365.5	0.1551	2.89	157,687	143,962	67,665	47	67,751	47	103	102
Columbus	237.0	0.1006	3.00	95,558	87,318	44,909	51	35,425	41	110	79
Macon - Warner Robins	273.0	0.1160	2.87	123,786	115,866	58,576	51	48,085	42	108	99
Savannah	226.7	0.0962	2.83	126,969	113,343	57,164	50	47,135	42	128	106
Non-Metro Portion of State	2,148.6	0.9122	2.96	556,818	528,889	297,015	56	203,013	38	65	92
State Total	**5,777.4**	**2.4530**	**2.87**	**2,445,967**	**2,293,148**	**1,165,767**	**51**	**942,991**	**41**	**101**	**105**
HAWAII											
Honolulu	805.8	0.3421	3.19	796,043	718,825	246,460	34	414,385	58	228	168
Non-Metro Portion of State	227.6	0.0967	3.10	179,286	172,119	43,479	25	120,385	70	132	201
State Total	**1,033.4**	**0.4388**	**3.17**	**975,329**	**890,944**	**289,939**	**33**	**534,770**	**60**	**200**	**176**
IDAHO											
Boise	190.6	0.0809	2.67	142,064	131,283	48,145	37	71,409	54	118	99
Non-Metro Portion of State	812.9	0.3452	2.94	288,021	242,616	90,085	37	134,768	56	66	81
State Total	**1,003.5**	**0.4261**	**2.88**	**430,085**	**373,899**	**138,230**	**37**	**206,177**	**55**	**78**	**85**
ILLINOIS											
Alton - Granite City	267.3	0.1135	2.68	124,773	100,100	55,187	55	41,006	41	77	81
Aurora - Elgin	329.6	0.1400	2.86	169,957	151,282	56,460	37	87,004	58	108	188
Bloomington - Normal	123.9	0.0526	2.74	67,708	60,433	23,546	39	32,294	53	114	89
Champaign - Urbana - Rantoul	168.8	0.0716	2.77	123,827	111,315	43,372	39	59,484	53	144	96
Chicago	6,028.5	2.5597	2.73	3,473,746	3,168,004	1,134,126	36	1,763,891	56	127	111
Davenport - Rock Island - Moline	388.7	0.1650	2.66	220,709	186,083	79,788	43	91,058	49	118	63
Decatur	132.0	0.0560	2.60	61,713	50,978	19,863	39	27,242	53	90	103
East St. Louis - Belleville	296.5	0.1259	2.81	130,766	105,837	52,345	49	49,892	47	99	89
Joliet	381.5	0.1619	3.04	118,449	102,255	38,783	38	58,098	57	86	98

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STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average Household Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
ILLINOIS *continued*											
Kankakee	104.5	0.0443	2.80	54,262	48,257	18,802	39	25,788	53	114	72
Lake County	467.1	0.1984	3.03	247,479	216,415	87,130	40	112,144	52	111	95
Peoria	370.9	0.1576	2.69	192,002	165,633	75,268	45	80,617	49	103	102
Rockford	281.2	0.1194	2.69	135,744	121,209	41,598	34	72,442	60	107	100
Springfield	193.6	0.0821	2.48	106,147	92,018	35,860	39	49,185	53	90	107
Non-Metro Portion of State	2,121.8	0.9008	2.62	799,729	663,900	298,780	45	327,592	49	79	69
State Total	**11,511.2**	**4.8874**	**2.72**	**5,934,115**	**5,261,510**	**2,025,313**	**38**	**2,839,609**	**54**	**111**	**100**
INDIANA											
Anderson	137.3	0.0583	2.75	58,782	52,040	25,334	49	22,586	43	93	72
Bloomington	101.3	0.0430	2.85	49,616	45,918	22,352	49	19,928	43	128	76
Elkhart - Goshen	139.7	0.0593	2.82	87,658	78,096	35,833	46	36,154	46	108	80
Evansville	282.7	0.1201	2.67	155,690	134,997	67,595	50	55,266	41	107	105
Fort Wayne	355.2	0.1508	2.81	234,440	212,706	82,655	39	118,169	56	146	93
Gary - Hammond	636.4	0.2701	2.97	341,615	306,901	144,540	47	144,159	47	100	89
Indianapolis	1,180.4	0.5013	2.75	617,151	576,909	298,739	52	218,541	38	110	106
Kokomo	102.8	0.0437	2.74	52,988	47,733	23,236	49	20,719	43	101	73
Lafayette	123.2	0.0523	2.93	68,229	63,206	30,767	49	27,436	43	129	105
Muncie	125.1	0.0531	2.85	68,065	61,526	29,947	49	26,705	43	126	78
South Bend - Mishawaka	236.7	0.1005	2.75	136,129	121,857	50,783	42	61,038	50	116	79
Terre Haute	135.3	0.0574	2.76	65,822	57,511	27,994	49	24,964	43	101	89
Non-Metro Portion of State	1,791.8	0.7607	2.84	594,235	521,716	239,029	46	242,768	47	77	72
State Total	**5,526.3**	**2.3464**	**2.82**	**2,603,695**	**2,345,041**	**1,112,725**	**47**	**1,044,254**	**45**	**101**	**87**
IOWA											
Cedar Rapids	170.6	0.0724	2.60	90,429	76,720	31,767	41	37,778	49	99	108
Davenport - Rock Island - Moline	388.7	0.1650	2.66	220,709	186,083	79,788	43	91,058	49	118	63
Des Moines	377.0	0.1601	2.55	216,207	189,095	80,009	42	82,460	44	89	107
Dubuque	93.7	0.0397	2.96	49,413	41,111	17,021	41	20,245	49	96	81
Iowa City	85.1	0.0361	2.59	53,488	45,630	19,156	42	23,980	53	108	149
Sioux City	117.8	0.0500	2.67	56,342	46,463	19,211	41	22,996	49	76	95
Waterloo - Cedar Falls	163.9	0.0696	2.75	73,016	59,830	24,761	41	29,580	49	81	85
Non-Metro Portion of State	1,692.1	0.7186	2.65	613,206	505,406	212,287	42	265,728	53	73	64
State Total	**2,934.0**	**1.2458**	**2.65**	**1,290,954**	**1,082,037**	**455,178**	**42**	**539,733**	**50**	**83**	**77**
KANSAS											
Kansas City	1,452.0	0.6161	2.64	799,357	755,268	351,695	47	335,447	44	109	111
Lawrence	70.9	0.0301	2.78	28,650	25,735	12,661	49	11,052	43	109	80
Topeka	156.0	0.0662	2.53	80,546	75,578	37,183	49	32,450	43	94	98
Wichita	424.7	0.1803	2.59	238,275	225,991	113,641	50	90,216	40	134	78
Non-Metro Portion of State	1,240.3	0.5267	2.62	409,655	376,160	172,297	46	182,661	49	77	60
State Total	**2,430.2**	**1.0318**	**2.63**	**1,032,708**	**969,783**	**471,592**	**49**	**421,974**	**44**	**98**	**75**
KENTUCKY											
Clarksville - Hopkinsville	157.0	0.0666	3.11	68,923	65,055	32,637	50	27,261	42	124	93
Huntington - Ashland	339.5	0.1442	2.74	109,323	101,025	61,369	61	32,434	32	66	92
Lexington-Fayette	328.8	0.1395	2.66	200,387	191,626	107,898	56	64,861	34	104	115
Louisville	964.7	0.4096	2.71	561,271	515,683	281,695	55	182,803	35	101	104
Owensboro	87.3	0.0370	2.70	44,892	40,805	22,689	56	14,844	36	92	86
Non-Metro Portion of State	2,054.6	0.8725	2.83	503,720	486,337	277,191	57	183,416	38	52	93
State Total	**3,753.2**	**1.5935**	**2.78**	**1,432,651**	**1,347,574**	**743,023**	**55**	**495,628**	**37**	**73**	**99**

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STATE Metro Name	12/31/83 Population (Thous.)	12/31/83 % Of U.S.	12/31/83 Average Household Size	1983 Eating & Drinking Place Sales ($000)	1983 Eating Place Sales ($000)	1983 Fast Food Sales ($000)	1983 Fast Food Market Share (%)	1983 Restaurant Sales ($000)	1983 Restaurant Market Share (%)	1983 RAI	1983 RGI
LOUISIANA											
Alexandria	142.2	0.0603	2.88	50,056	47,324	23,094	49	20,636	44	83	87
Baton Rouge	543.5	0.2308	2.89	244,852	222,946	120,164	54	94,160	42	88	129
Houma - Thibodaux	191.6	0.0813	3.06	110,705	99,600	49,133	49	37,850	38	107	123
Lafayette	213.8	0.0908	2.87	115,999	104,821	51,238	49	45,095	43	109	112
Lake Charles	177.0	0.0751	2.85	86,940	80,392	39,241	49	35,048	44	72	107
Monroe	146.7	0.0622	2.84	64,224	59,619	29,099	49	25,993	44	102	91
New Orleans	1,330.5	0.5649	2.73	844,253	755,135	331,487	44	372,887	49	111	143
Shreveport	349.7	0.1485	2.72	184,627	172,672	88,845	51	70,923	41	128	111
Non-Metro Portion of State	1,376.7	0.5847	2.98	312,297	271,560	134,664	50	103,014	38	51	101
State Total	**4,471.7**	**1.8986**	**2.86**	**2,013,953**	**1,814,069**	**866,965**	**48**	**805,606**	**44**	**90**	**120**
MAINE											
Bangor	137.9	0.0586	2.91	60,865	57,682	19,724	34	33,658	58	72	106
Lewiston - Auburn	100.3	0.0426	2.74	52,859	50,110	17,131	34	29,238	58	92	82
Portland	221.0	0.0939	2.64	143,941	139,198	47,599	34	81,223	58	107	87
Non-Metro Portion of State	695.0	0.2950	2.76	297,842	285,822	97,765	34	166,842	58	88	79
State Total	**1,154.2**	**0.4901**	**2.75**	**555,507**	**532,812**	**182,219**	**34**	**310,961**	**58**	**91**	**84**
MARYLAND											
Baltimore	2,248.6	0.9548	2.81	1,078,546	909,627	395,753	44	431,876	47	91	106
Cumberland	105.9	0.0450	2.72	34,110	30,781	12,498	41	16,792	55	75	68
Hagerstown	114.6	0.0487	2.80	44,670	37,212	14,592	39	20,836	56	84	101
Non-Metro Portion of State	312.1	0.1325	2.81	152,265	137,056	53,761	39	76,709	56	91	88
State Total	**4,327.7**	**1.8375**	**2.83**	**2,089,515**	**1,852,105**	**787,218**	**43**	**922,558**	**50**	**90**	**106**
MASSACHUSETTS											
Boston - Lawrence - Salem - Lowell - Brockton	3,652.8	1.5509	2.73	2,576,540	2,332,903	627,734	27	1,529,236	66	122	110
New Bedford - Fall River - Attleboro	485.9	0.2063	2.78	247,183	219,445	80,061	36	127,272	58	91	81
Pittsfield	142.5	0.0605	2.65	84,363	70,074	23,065	33	43,605	62	69	77
Springfield	581.3	0.2468	2.79	304,673	260,802	76,244	29	160,547	62	71	86
Worcester - Fitchburg - Leominster	650.9	0.2764	2.78	298,707	266,251	78,737	30	163,658	61	84	89
Non-Metro Portion of State	251.5	0.1068	2.49	290,360	271,669	54,576	20	205,076	75	165	76
State Total	**5,764.9**	**2.4477**	**2.74**	**3,801,826**	**3,421,144**	**940,417**	**27**	**2,229,394**	**65**	**110**	**100**
MICHIGAN											
Ann Arbor	268.7	0.1141	2.81	141,221	131,220	50,559	39	70,735	54	165	123
Battle Creek	135.9	0.0577	2.72	70,041	63,207	24,356	39	34,074	54	169	79
Benton Harbor	165.7	0.0704	2.77	70,778	61,279	22,057	36	36,791	60	86	75
Detroit	4,346.9	1.8457	2.80	1,983,507	1,767,290	674,057	38	933,755	53	87	99
Flint	437.8	0.1859	2.82	202,882	175,976	71,480	41	88,923	51	91	107
Grand Rapids	610.4	0.2592	2.84	275,417	247,197	76,636	31	155,383	63	158	109
Jackson	150.0	0.0637	2.92	48,405	42,512	16,380	39	22,917	54	116	88
Kalamazoo	212.4	0.0902	2.77	112,587	105,125	42,075	40	57,426	55	150	108
Lansing - East Lansing	421.1	0.1790	2.89	202,036	177,047	79,327	45	85,423	48	119	116
Muskegon	153.5	0.0652	2.83	57,755	51,167	19,716	39	27,581	54	126	86
Saginaw - Bay City - Midland	414.7	0.1760	2.91	214,345	182,213	69,678	38	99,353	55	100	107
Non-Metro Portion of State	1,812.2	0.7690	2.86	618,798	488,628	178,676	37	289,404	59	71	71
State Total	**9,129.3**	**3.8761**	**2.83**	**3,997,772**	**3,492,861**	**1,324,997**	**38**	**1,901,765**	**54**	**93**	**95**
MINNESOTA											
Duluth	264.2	0.1122	2.68	111,662	88,198	29,193	33	53,647	61	80	84

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STATE Metro Name	12/31/83 Population (Thous.)	12/31/83 % Of U.S.	12/31/83 Average Household Size	1983 Eating & Drinking Place Sales ($000)	1983 Eating Place Sales ($000)	1983 Fast Food Sales ($000)	1983 Fast Food Market Share (%)	1983 Restaurant Sales ($000)	1983 Restaurant Market Share (%)	1983 RAI	1983 RGI
MINNESOTA *continued*											
Fargo - Moorhead	145.3	0.0617	2.74	101,934	84,523	31,737	38	46,635	55	137	111
Minneapolis - St. Paul	2,200.2	0.9343	2.72	1,306,537	1,154,714	383,576	33	677,195	59	107	133
Rochester	94.2	0.0400	2.75	58,559	53,287	16,931	32	32,372	61	117	173
St. Cloud	173.2	0.0735	3.24	59,513	48,347	15,364	32	29,372	61	104	96
Non-Metro Portion of State	1,476.6	0.6270	2.82	534,742	441,027	122,853	28	289,799	66	79	64
State Total	**4,168.4**	**1.7699**	**2.77**	**2,061,060**	**1,783,267**	**566,377**	**32**	**1,081,280**	**61**	**97**	**104**
MISSISSIPPI											
Biloxi - Gulfport	192.6	0.0818	2.90	88,735	81,092	44,846	55	30,139	37	89	103
Jackson	385.5	0.1636	2.90	150,256	145,344	75,693	52	48,122	33	88	115
Pascagoula	127.7	0.0542	3.00	34,539	31,825	17,603	55	11,828	37	58	100
Non-Metro Portion of State	1,840.0	0.7812	2.97	391,650	375,545	208,402	55	147,427	39	49	92
State Total	**2,605.1**	**1.1060**	**2.96**	**671,800**	**640,426**	**350,043**	**55**	**240,161**	**38**	**58**	**98**
MISSOURI											
Columbia	105.8	0.0449	2.78	61,402	58,934	26,303	45	28,009	48	119	107
Joplin	131.1	0.0557	2.63	60,452	56,639	25,276	45	28,978	51	90	59
Kansas City	1,452.0	0.6161	2.64	799,357	755,268	351,695	47	335,447	44	109	111
St. Joseph	86.7	0.0368	2.67	45,633	40,570	18,105	45	19,280	48	90	83
St. Louis	1,812.0	0.7694	2.74	926,722	849,804	382,013	45	386,476	45	86	107
Springfield	219.1	0.0930	2.64	113,921	107,720	52,869	49	45,364	42	108	89
Non-Metro Portion of State	1,742.6	0.7403	2.75	489,525	443,594	198,258	45	227,781	51	63	62
State Total	**4,990.3**	**2.1189**	**2.71**	**2,214,287**	**2,042,556**	**916,900**	**45**	**964,016**	**47**	**85**	**90**
MONTANA											
Billings	117.5	0.0499	2.59	90,641	74,310	25,311	34	42,672	57	92	96
Great Falls	80.5	0.0342	2.61	53,195	38,852	13,237	34	22,316	57	93	83
Non-Metro Portion of State	624.6	0.2651	2.69	373,620	264,433	89,850	34	155,010	59	86	79
State Total	**822.6**	**0.3492**	**2.66**	**517,456**	**377,595**	**128,398**	**34**	**219,998**	**58**	**88**	**82**
NEBRASKA											
Lincoln	201.8	0.0857	2.62	117,098	104,340	42,788	41	53,177	51	115	107
Omaha	597.2	0.2537	2.72	349,085	293,560	118,750	40	147,364	50	107	100
Non-Metro Portion of State	872.8	0.3705	2.70	353,967	280,375	110,938	40	152,824	55	79	60
State Total	**1,603.4**	**0.6808**	**2.70**	**781,336**	**646,376**	**258,914**	**40**	**336,251**	**52**	**94**	**79**
NEVADA											
Las Vegas	529.3	0.2247	2.55	316,862	260,522	90,530	35	149,875	58	101	684
Reno	213.4	0.0906	2.41	156,524	139,960	48,902	35	80,788	58	118	401
Non-Metro Portion of State	161.9	0.0688	2.60	77,019	62,601	21,978	35	36,297	58	99	537
State Total	**904.6**	**0.3841**	**2.52**	**550,405**	**463,083**	**161,410**	**35**	**266,960**	**58**	**106**	**586**
NEW HAMPSHIRE											
Manchester - Nashua	288.6	0.1225	2.81	169,246	161,821	45,909	28	102,677	63	102	107
Portsmouth - Dover - Rochester	295.1	0.1253	2.84	184,386	179,674	50,012	28	116,823	65	92	91
Non-Metro Portion of State	380.8	0.1617	2.73	195,180	190,144	52,925	28	123,627	65	81	85
State Total	**964.5**	**0.4095**	**2.79**	**548,812**	**531,639**	**148,846**	**28**	**343,127**	**65**	**90**	**93**
NEW JERSEY											
Atlantic City	295.5	0.1254	2.60	299,375	244,266	66,934	27	169,187	69	124	224

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STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average Household Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
NEW JERSEY *continued*											
Bergen - Passaic	1,277.4	0.5424	2.76	771,352	666,099	206,697	31	405,483	61	88	102
Jersey City	548.4	0.2329	2.65	174,347	122,610	40,903	33	70,840	58	51	109
Middlesex - Somerset - Hunterdon	905.5	0.3844	2.91	428,626	339,562	118,012	35	196,716	58	71	110
Monmouth - Ocean	910.5	0.3866	2.72	474,619	391,195	117,117	30	255,326	65	77	86
Newark	1,868.8	0.7934	2.83	865,405	703,689	209,360	30	421,068	60	73	120
Trenton	310.8	0.1320	2.85	153,021	117,895	37,187	32	70,429	60	65	118
Vineland - Millville - Bridgeton	137.0	0.0581	2.94	53,858	42,027	13,247	32	25,637	61	49	101
State Total	**7,484.6**	**3.1778**	**2.81**	**3,764,725**	**3,079,218**	**961,646**	**31**	**1,887,439**	**61**	**78**	**116**
NEW MEXICO											
Albuquerque	455.8	0.1936	2.67	281,085	257,921	107,646	42	121,955	47	127	97
Las Cruces	106.4	0.0451	2.98	47,589	40,688	16,901	42	21,083	52	105	90
Santa Fe	100.8	0.0427	2.69	79,081	75,801	31,612	42	39,146	52	149	95
Non-Metro Portion of State	753.7	0.3201	2.98	295,194	256,971	106,784	42	134,408	52	74	81
State Total	**1,416.7**	**0.6015**	**2.85**	**702,949**	**631,381**	**262,943**	**42**	**316,592**	**50**	**98**	**88**
NEW YORK											
Albany - Schenectady - Troy	861.9	0.3660	2.72	405,865	349,197	104,428	30	220,031	63	77	92
Binghamton	266.6	0.1131	2.76	121,134	101,290	33,037	33	63,090	62	74	108
Buffalo	993.5	0.4218	2.73	526,924	436,660	144,124	33	267,148	61	79	79
Elmira	98.2	0.0417	2.81	31,383	26,048	7,630	29	16,464	63	55	101
Glens Falls	114.5	0.0487	2.91	63,479	56,790	17,300	30	36,493	64	80	67
Nassau - Suffolk	2,665.9	1.1319	3.13	1,191,553	1,098,412	339,163	31	664,989	61	81	85
New York	8,241.8	3.4994	2.55	3,895,471	3,545,953	958,389	27	2,309,878	65	107	104
Niagara Falls	228.2	0.0969	2.76	105,109	87,350	29,879	34	49,732	57	83	75
Orange County	277.7	0.1179	3.07	101,611	89,442	25,675	29	58,986	66	56	78
Poughkeepsie	259.0	0.1100	2.97	100,364	88,595	25,955	29	55,994	63	61	98
Rochester	995.9	0.4227	2.76	459,296	402,056	123,854	31	251,298	63	81	103
Syracuse	658.4	0.2796	2.83	327,529	281,610	84,858	30	172,604	61	74	97
Utica - Rome	320.3	0.1359	2.83	149,461	123,927	47,186	38	67,529	54	73	74
Non-Metro Portion of State	1,758.8	0.7469	2.88	654,659	539,501	164,356	30	346,671	64	69	89
State Total	**17,740.7**	**7.5325**	**2.72**	**8,133,838**	**7,226,831**	**2,105,834**	**29**	**4,580,907**	**63**	**88**	**96**
NORTH CAROLINA											
Asheville	165.6	0.0703	2.58	90,231	85,418	43,884	51	34,835	41	117	88
Burlington	98.5	0.0418	2.66	47,989	46,932	24,108	51	19,141	41	104	100
Charlotte - Gastonia - Rock Hill	1,013.3	0.4303	2.75	462,882	447,415	230,306	51	181,926	41	100	103
Fayetteville	260.5	0.1106	3.20	102,966	94,423	48,516	51	38,510	41	115	88
Greensboro - Winston-Salem - High Point	880.3	0.3737	2.67	444,093	432,066	205,486	48	166,421	39	113	96
Hickory	211.8	0.0898	2.76	86,292	84,760	46,018	54	34,607	41	103	90
Jacksonville	120.0	0.0509	3.61	50,631	44,664	24,218	54	18,386	41	185	79
Raleigh - Durham	600.3	0.2549	2.70	340,354	331,506	155,037	47	142,116	43	130	105
Wilmington	109.7	0.0466	2.66	74,248	71,352	36,659	51	29,100	41	127	88
Non-Metro Portion of State	2,774.4	1.1782	2.82	858,174	836,196	453,333	54	344,621	41	78	85
State Total	**6,120.3**	**2.5986**	**2.78**	**2,505,693**	**2,425,138**	**1,242,573**	**51**	**988,169**	**41**	**98**	**92**
NORTH DAKOTA											
Bismarck	89.2	0.0379	2.81	50,877	43,604	16,100	37	23,544	54	113	120
Fargo - Moorhead	145.3	0.0617	2.74	101,934	84,523	31,737	38	46,635	55	137	111
Grand Forks	69.1	0.0293	2.94	37,542	31,144	12,284	39	16,456	53	154	113
Non-Metro Portion of State	433.1	0.1838	2.83	163,097	117,792	43,970	37	64,324	55	83	71
State Total	**687.0**	**0.2916**	**2.81**	**326,131**	**255,717**	**97,309**	**38**	**137,992**	**54**	**107**	**87**

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STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average Household Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
OHIO											
Akron	650.5	0.2762	2.68	352,876	315,280	133,286	42	167,311	53	92	98
Canton	405.8	0.1723	2.76	213,560	188,439	78,302	42	98,065	52	90	83
Cincinnati	1,395.0	0.5923	2.69	827,592	746,353	329,523	44	347,988	47	113	103
Cleveland	1,843.3	0.7827	2.62	1,047,055	922,439	346,396	38	497,545	54	104	100
Columbus	1,263.4	0.5365	2.63	770,115	695,387	321,618	46	325,784	47	130	99
Dayton - Springfield	925.6	0.3929	2.63	498,766	452,766	211,522	47	207,317	46	110	90
Hamilton - Middletown	268.4	0.1140	2.83	107,643	91,732	56,740	62	30,414	33	74	93
Lima	156.6	0.0665	2.78	75,650	70,287	30,554	43	34,353	49	111	77
Lorain - Elyria	276.6	0.1174	2.87	93,400	75,427	34,766	46	35,117	47	65	96
Mansfield	129.6	0.0550	2.69	64,490	56,542	24,575	43	27,637	49	110	80
Parkersburg - Marietta	159.7	0.0678	2.73	67,367	61,843	29,705	48	27,212	44	72	87
Steubenville - Weirton	157.9	0.0670	2.72	55,328	45,357	21,358	47	20,421	45	65	88
Toledo	617.1	0.2620	2.69	409,248	365,306	146,564	40	185,781	51	119	94
Youngstown - Warren	521.0	0.2212	2.71	243,539	208,816	94,802	45	99,853	48	89	81
Non-Metro Portion of State	2,317.5	0.9840	2.79	821,144	705,986	307,378	44	346,656	49	78	76
State Total	**10,767.4**	**4.5717**	**2.69**	**5,491,125**	**4,857,371**	**2,098,424**	**43**	**2,387,524**	**49**	**101**	**91**
OKLAHOMA											
Enid	67.8	0.0288	2.61	49,779	48,192	24,178	50	20,648	43	150	74
Lawton	116.9	0.0496	3.25	48,001	44,894	22,850	51	18,447	41	108	82
Oklahoma City	954.6	0.4054	2.65	635,398	605,655	318,310	53	234,388	39	143	83
Tulsa	733.6	0.3115	2.64	376,160	361,941	179,798	50	147,858	41	110	98
Non-Metro Portion of State	1,437.6	0.6103	2.69	502,601	491,794	241,510	50	210,578	44	78	69
State Total	**3,345.6**	**1.4205**	**2.69**	**1,621,403**	**1,551,531**	**791,257**	**51**	**635,638**	**41**	**107**	**80**
OREGON											
Eugene - Springfield	270.5	0.1149	2.54	137,603	123,500	52,301	42	58,781	48	94	82
Medford	138.1	0.0587	2.64	65,463	57,745	20,435	35	34,576	60	83	72
Portland	1,125.6	0.4779	2.53	732,845	646,872	227,100	35	357,358	55	148	102
Salem	254.4	0.1081	2.69	123,345	110,522	39,805	36	61,683	56	136	61
Non-Metro Portion of State	887.1	0.3765	2.66	443,353	390,914	138,565	35	234,381	60	93	63
State Total	**2,675.7**	**1.1361**	**2.59**	**1,502,609**	**1,329,553**	**478,206**	**36**	**746,779**	**56**	**117**	**80**
PENNSYLVANIA											
Allentown - Bethlehem	651.1	0.2764	2.68	305,408	270,794	107,340	40	138,707	51	89	92
Altoona	136.9	0.0582	2.71	57,093	50,155	18,460	37	27,935	56	78	79
Beaver County	203.0	0.0861	2.77	60,002	46,735	18,163	39	25,626	55	59	118
Erie	285.2	0.1211	2.80	116,575	97,215	41,989	43	50,479	52	103	97
Harrisburg - Lebanon - Carlisle	572.8	0.2432	2.66	290,934	252,950	105,275	42	132,748	52	85	111
Johnstown	264.7	0.1123	2.79	76,846	61,543	30,653	50	27,423	45	64	101
Lancaster	376.7	0.1599	2.83	161,163	145,483	52,707	36	87,824	60	87	113
Philadelphia	4,725.1	2.0062	2.79	2,196,323	1,870,577	651,354	35	1,065,510	57	94	113
Pittsburgh	2,176.3	0.9239	2.62	1,009,511	846,442	281,561	33	496,371	59	95	104
Reading	319.8	0.1357	2.64	142,868	127,111	46,040	36	75,747	60	98	93
Scranton - Wilkes-Barre	738.1	0.3133	2.68	286,917	248,487	87,766	35	138,584	56	79	88
Sharon	128.4	0.0545	2.78	45,931	38,795	14,702	38	21,920	57	75	80
State College	116.0	0.0493	3.01	53,319	50,867	19,287	38	28,755	57	84	81
Williamsport	120.5	0.0512	2.74	36,864	29,586	10,892	37	16,477	56	55	83
York	397.9	0.1690	2.73	151,027	132,897	57,214	43	67,492	51	81	103
Non-Metro Portion of State	1,868.0	0.7935	2.78	528,459	440,725	166,750	38	249,519	57	68	77
State Total	**11,916.6**	**5.0596**	**2.72**	**4,997,064**	**4,276,817**	**1,563,541**	**37**	**2,390,617**	**56**	**88**	**100**
RHODE ISLAND											
Providence - Pawtucket - Woonsocket	872.3	0.3704	2.72	481,169	428,073	132,664	31	263,110	61	108	86

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STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
RHODE ISLAND *continued*											
Non-Metro Portion of State	82.0	0.0348	2.76	74,578	61,894	17,343	28	40,567	66	190	69
State Total	**954.3**	**0.4052**	**2.72**	**555,747**	**489,967**	**150,007**	**31**	**303,677**	**62**	**114**	**84**
SOUTH CAROLINA											
Anderson	142.9	0.0606	2.75	41,433	39,708	20,004	50	17,215	43	68	83
Charleston	473.7	0.2011	3.02	172,988	163,976	87,488	53	58,005	35	108	118
Charlotte - Gastonia - Rock Hill	1,013.3	0.4303	2.75	462,882	447,415	230,306	51	181,926	41	100	103
Columbia	434.9	0.1846	2.90	193,970	184,514	97,078	53	69,072	37	122	102
Florence	116.2	0.0494	2.95	34,993	34,348	17,295	50	14,884	43	82	115
Greenville - Spartanburg	599.3	0.2543	2.76	280,677	270,254	147,639	55	102,490	38	116	91
Non-Metro Portion of State	1,315.4	0.5587	2.95	369,222	353,705	178,288	50	153,341	43	78	110
State Total	**3,306.8**	**1.4040**	**2.90**	**1,173,388**	**1,122,698**	**585,958**	**52**	**448,260**	**40**	**95**	**105**
SOUTH DAKOTA											
Sioux Falls	115.5	0.0491	2.58	75,854	66,105	23,484	36	37,790	57	124	110
Non-Metro Portion of State	590.3	0.2505	2.75	248,881	198,275	62,753	32	119,911	60	83	69
State Total	**705.8**	**0.2996**	**2.72**	**324,735**	**264,380**	**86,237**	**33**	**157,701**	**60**	**91**	**76**
TENNESSEE											
Chattanooga	433.0	0.1840	2.76	185,201	178,397	85,699	48	82,302	46	95	107
Clarksville - Hopkinsville	157.0	0.0666	3.11	68,923	65,055	32,637	50	27,261	42	124	93
Johnson City - Kingsport - Bristol	444.3	0.1888	2.75	181,089	176,343	103,451	59	54,486	31	89	58
Knoxville	583.7	0.2479	2.68	322,322	310,360	162,539	52	124,716	40	126	112
Memphis	920.4	0.3909	2.88	428,428	409,275	193,780	47	172,993	42	94	106
Nashville	889.4	0.3777	2.77	557,332	538,747	222,724	41	269,042	50	125	117
Non-Metro Portion of State	1,669.7	0.7087	2.82	462,016	440,187	213,585	49	203,823	46	67	90
State Total	**4,719.8**	**2.0040**	**2.79**	**2,122,294**	**2,038,781**	**969,899**	**48**	**905,053**	**44**	**99**	**101**
TEXAS											
Abilene	120.0	0.0509	2.83	57,330	54,314	24,886	46	24,985	46	95	69
Amarillo	191.4	0.0813	2.64	158,844	139,805	64,053	46	64,312	46	125	82
Austin	623.7	0.2647	2.65	414,850	362,961	159,467	44	175,580	48	120	96
Beaumont - Port Arthur	397.9	0.1690	2.82	219,179	199,545	96,105	48	86,775	43	93	102
Brazoria	200.8	0.0853	3.10	69,261	61,856	33,829	55	24,729	40	60	128
Brownsville - Harlingen	238.8	0.1014	3.53	82,324	73,580	33,712	46	33,850	46	79	102
Bryan - College Station	110.3	0.0468	2.77	62,692	57,666	26,422	46	26,526	46	178	85
Corpus Christi	351.4	0.1492	3.07	162,698	138,199	58,114	42	69,901	51	79	94
Dallas	2,182.0	0.9265	2.69	1,529,084	1,417,817	602,858	43	667,168	47	134	122
El Paso	533.1	0.2263	3.38	226,712	180,632	73,153	40	92,167	51	98	107
Fort Worth - Arlington	1,085.8	0.4610	2.74	804,097	735,976	363,037	49	297,636	40	164	105
Galveston - Texas City	212.6	0.0903	2.79	114,728	101,866	46,672	46	46,861	46	74	103
Houston	3,150.8	1.3376	2.76	1,952,802	1,756,920	797,700	45	825,374	47	107	141
Killeen - Temple	238.5	0.1013	3.15	99,042	92,390	42,332	46	42,503	46	112	85
Laredo	113.6	0.0482	3.80	42,365	37,976	17,401	46	17,468	46	73	107
Longview - Marshall	169.8	0.0720	2.79	79,336	74,473	34,124	46	34,261	46	75	64
Lubbock	228.6	0.0970	2.83	147,506	133,980	61,386	46	61,635	46	117	88
McAllen - Edinburg - Mission	332.6	0.1412	3.69	78,964	66,381	37,369	56	23,202	35	50	92
Midland	97.3	0.0413	2.75	45,264	41,190	18,872	46	18,949	46	75	86
Odessa	130.8	0.0556	2.77	110,419	98,342	45,057	46	45,240	46	122	96
San Angelo	94.4	0.0401	2.75	57,559	49,931	22,876	46	22,970	46	80	76
San Antonio	1,173.6	0.4983	2.99	622,973	547,886	231,571	42	266,292	49	101	100
Sherman - Denison	94.7	0.0403	2.62	32,608	32,015	14,668	46	14,728	46	70	71
Texarkana	118.4	0.0503	2.75	51,466	49,228	24,116	49	21,167	43	71	72

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STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
TEXAS *continued*											
Tyler	145.9	0.0620	2.76	72,250	69,902	32,025	46	32,158	46	81	91
Victoria	77.5	0.0329	2.95	46,886	38,963	18,535	48	18,766	48	101	84
Waco	184.1	0.0782	2.74	102,747	91,337	41,850	46	42,017	46	93	84
Wichita Falls	125.1	0.0531	2.77	73,432	65,776	30,138	46	30,258	46	111	77
Non-Metro Portion of State	3,211.6	1.3637	2.83	898,693	820,226	392,074	48	394,637	48	57	63
State Total	**15,896.8**	**6.7495**	**2.84**	**8,400,488**	**7,577,109**	**3,436,412**	**45**	**3,517,143**	**46**	**100**	**101**
UTAH											
Provo - Orem	252.8	0.1073	3.76	69,956	67,487	30,550	45	31,793	47	80	92
Salt Lake City - Ogden	1,008.1	0.4281	3.13	382,982	363,585	172,187	47	162,023	45	90	90
Non-Metro Portion of State	381.5	0.1620	3.36	143,475	136,940	48,474	35	80,129	59	96	85
State Total	**1,642.4**	**0.6974**	**3.26**	**596,413**	**568,012**	**251,211**	**44**	**273,945**	**48**	**90**	**89**
VERMONT											
Burlington	124.2	0.0527	2.88	95,259	85,551	22,957	27	56,097	66	136	112
Non-Metro Portion of State	404.7	0.1718	2.75	218,261	197,065	52,875	27	129,215	66	92	88
State Total	**528.9**	**0.2245**	**2.78**	**313,520**	**282,616**	**75,832**	**27**	**185,312**	**66**	**102**	**94**
VIRGINIA											
Charlottesville	120.6	0.0512	2.82	49,713	49,453	24,592	50	21,571	44	93	87
Danville	112.2	0.0477	2.77	30,847	30,203	14,999	50	13,154	44	57	84
Lynchburg	144.5	0.0615	2.90	46,833	46,118	21,520	47	21,108	46	67	94
Norfolk - Virginia Beach - Newport News	1,210.7	0.5139	2.94	620,085	597,367	290,391	49	271,546	45	123	101
Richmond - Petersburg	788.3	0.3346	2.77	377,666	367,848	172,360	47	165,168	45	101	97
Roanoke	223.3	0.0949	2.65	109,172	106,515	49,657	47	48,934	46	97	88
Non-Metro Portion of State	1,658.8	0.7043	2.91	429,493	422,265	209,738	50	184,205	44	60	94
State Total	**5,583.5**	**2.3707**	**2.83**	**2,373,918**	**2,318,106**	**1,045,253**	**45**	**1,093,182**	**47**	**93**	**104**
WASHINGTON											
Bellingham	112.7	0.0478	2.66	84,858	82,756	27,367	33	51,306	62	176	75
Bremerton	165.7	0.0704	2.76	63,533	55,969	18,515	33	34,702	62	76	125
Olympia	138.2	0.0586	2.62	66,256	59,770	19,767	33	37,061	62	92	84
Richland - Kennewick - Pasco	159.1	0.0676	2.75	90,672	79,584	26,504	33	47,071	59	86	120
Seattle	1,675.4	0.7113	2.55	1,298,080	1,182,739	358,065	30	711,165	60	134	105
Spokane	354.2	0.1504	2.60	180,327	160,048	64,377	40	86,527	54	101	103
Tacoma	513.3	0.2179	2.70	232,404	200,780	74,938	37	112,163	56	108	87
Vancouver	207.5	0.0881	2.74	95,353	80,824	31,539	39	44,428	55	110	91
Yakima	179.8	0.0763	2.76	79,171	68,997	22,979	33	40,809	59	88	75
Non-Metro Portion of State	840.8	0.3571	2.64	380,811	320,226	105,596	33	198,722	62	84	73
State Total	**4,346.7**	**1.8455**	**2.62**	**2,571,465**	**2,291,693**	**749,647**	**33**	**1,363,954**	**60**	**112**	**94**
WEST VIRGINIA											
Charleston	267.5	0.1135	2.62	110,674	106,208	54,132	51	43,423	41	73	109
Huntington - Ashland	339.5	0.1442	2.74	109,323	101,025	61,369	61	32,434	32	66	92
Parkersburg - Marietta	159.7	0.0678	2.73	67,367	61,843	29,705	48	27,212	44	72	87
Steubenville - Weirton	157.9	0.0670	2.72	55,328	45,357	21,358	47	20,421	45	65	88
Wheeling	183.3	0.0778	2.64	84,204	72,780	34,640	48	32,375	44	84	85
Non-Metro Portion of State	1,262.6	0.5363	2.82	281,449	263,074	137,434	52	104,914	40	44	96
State Total	**1,973.5**	**0.8380**	**2.76**	**571,045**	**532,738**	**280,932**	**53**	**209,826**	**39**	**55**	**96**

STATE Metro Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
WISCONSIN											
Appleton - Oshkosh - Neenah	296.0	0.1257	2.80	144,361	114,518	39,851	35	67,426	59	104	95
Eau Claire	135.5	0.0575	2.85	81,631	60,620	19,805	33	36,288	60	139	96
Green Bay	180.6	0.0767	2.77	106,202	85,794	28,027	33	51,355	60	115	98
Janesville - Beloit	139.3	0.0591	2.74	68,628	56,213	16,125	29	36,639	65	87	80
Kenosha	122.3	0.0519	2.75	60,561	45,710	14,932	33	27,363	60	99	89
La Crosse	93.0	0.0394	2.76	80,857	66,417	21,695	33	39,758	60	205	80
Madison	332.6	0.1412	2.57	267,445	226,579	86,775	38	125,368	55	178	125
Milwaukee	1,389.2	0.5897	2.69	870,946	728,256	242,554	33	418,821	58	115	107
Racine	171.2	0.0727	2.81	81,315	66,529	21,735	33	39,824	60	100	91
Sheboygan	101.2	0.0430	2.78	44,142	33,044	9,480	29	21,539	65	77	90
Wausau	114.4	0.0486	2.84	41,059	30,635	8,779	29	19,952	65	72	109
Non-Metro Portion of State	1,601.1	0.6799	2.79	723,824	523,472	150,293	29	341,592	65	98	68
State Total	**4,766.1**	**2.0236**	**2.74**	**2,608,243**	**2,061,439**	**668,373**	**32**	**1,239,997**	**60**	**111**	**90**
WYOMING											
Casper	77.9	0.0330	2.65	63,341	50,540	19,094	38	27,151	54	95	174
Non-Metro Portion of State	439.6	0.1867	2.74	266,279	210,593	79,956	38	113,708	54	104	136
State Total	**517.5**	**0.2197**	**2.72**	**329,620**	**261,133**	**99,050**	**38**	**140,859**	**54**	**103**	**141**
United States Total	**235,524.3**	**100.0000**	**2.75**	**118,727,482**	**106,693,795**	**41,458,287**	**39**	**56,955,356**	**53**	**100**	**100**

Sales by Area of Dominant Influence (ADI)

This 12th installment of the ADI Report shows 211 areas of dominant influence for a TV signal. Each area includes major cities and nearby counties.

ADI Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Abilene - Sweetwater	303.8	0.1289	2.71	108,705	101,079	46,964	46	47,589	47	73	66
Albany, Ga.	380.8	0.1618	3.00	95,744	91,990	49,473	54	36,620	40	67	95
Albany - Schenectady - Troy	1,311.8	0.5570	2.73	624,117	536,607	162,406	30	339,328	63	75	85
Albuquerque	1,144.7	0.4859	2.89	585,552	530,294	213,684	40	272,049	51	104	92
Alexandria, La.	265.2	0.1125	2.99	67,012	58,831	28,739	49	25,066	43	61	100
Alexandria, Minn.	165.7	0.0702	2.86	60,353	49,603	13,864	28	32,695	66	80	63
Alpena	41.9	0.0178	2.74	17,565	13,939	5,022	36	8,339	60	73	62
Amarillo	481.8	0.2045	2.74	260,177	235,988	108,719	46	111,225	47	97	71
Anniston	122.8	0.0521	2.90	44,603	43,089	25,083	58	14,490	34	92	98
Ardmore - Ada	203.0	0.0861	2.68	59,281	56,791	28,478	50	24,531	43	66	72
Atlanta	3,120.8	1.3245	2.79	1,559,557	1,472,369	736,748	50	604,470	41	116	110
Augusta	608.2	0.2584	2.95	180,442	166,403	79,980	48	76,870	46	77	103
Austin, Tex.	749.6	0.3180	2.66	451,419	396,981	175,741	44	191,961	48	112	91
Bakersfield	443.4	0.1883	2.83	260,089	238,976	87,369	37	135,262	57	90	91
Baltimore	2,409.5	1.0231	2.81	1,145,265	970,286	416,861	43	469,087	48	90	104

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ADI Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Bangor	344.6	0.1463	2.80	140,292	135,259	46,256	34	78,945	58	72	82
Baton Rouge	757.0	0.3216	2.98	305,909	275,378	146,117	53	114,126	41	82	129
Beaumont - Port Arthur	474.6	0.2015	2.81	232,655	212,492	102,438	48	92,990	44	84	98
Bend	67.4	0.0286	2.66	35,298	32,186	11,396	35	19,275	60	76	79
Billings - Hardin	233.2	0.0988	2.64	152,650	118,829	41,015	35	68,279	57	92	89
Biloxi - Gulfport - Pascagoula	174.9	0.0743	2.91	86,882	79,992	44,239	55	29,728	37	99	100
Binghamton	431.6	0.1830	2.80	154,241	127,706	41,717	33	79,416	62	61	97
Birmingham	1,357.9	0.5767	2.74	454,984	431,789	242,729	56	154,486	36	78	95
Bluefield - Beckley - Oak Hill	401.3	0.1704	2.82	97,017	92,753	48,143	52	37,269	40	42	104
Boise	425.7	0.1808	2.78	220,268	197,636	72,540	37	109,298	55	92	81
Boston	5,348.8	2.2710	2.74	3,620,705	3,314,140	882,760	27	2,184,957	66	115	103
Bowling Green	119.4	0.0506	2.77	42,189	38,944	22,322	57	14,593	37	66	98
Bristol - Kingsport - Johnson City	768.5	0.3265	2.83	239,159	233,229	131,775	57	79,616	34	72	75
Buffalo	1,725.4	0.7325	2.77	807,051	666,360	218,379	33	407,261	61	79	78
Burlington - Plattsburgh	618.8	0.2628	2.86	326,888	287,340	79,243	28	187,635	65	93	98
Casper - Riverton	157.0	0.0668	2.76	108,577	81,667	30,967	38	44,040	54	91	143
Cedar Rapids - Waterloo - Dubuque	868.7	0.3687	2.73	389,996	319,311	130,287	41	164,951	52	91	83
Charleston, S.C.	592.2	0.2514	3.03	206,248	195,286	103,270	53	71,579	37	105	113
Charleston - Huntington	1,489.4	0.6324	2.81	404,005	370,467	195,089	53	148,239	40	55	94
Charlotte	1,772.9	0.7528	2.77	716,005	692,606	362,336	52	283,279	41	95	99
Chattanooga	821.0	0.3485	2.81	292,297	281,014	139,425	50	125,605	45	79	101
Cheyenne	130.4	0.0552	2.63	67,030	58,891	22,533	38	31,658	54	97	105
Chicago	8,450.1	3.5878	2.78	4,645,402	4,189,961	1,563,215	37	2,291,353	55	120	108
Chico - Redding	380.5	0.1615	2.57	173,208	151,278	51,919	34	93,661	62	78	69
Cincinnati	1,963.6	0.8338	2.73	1,012,005	903,731	417,605	46	408,452	45	100	97
Clarksburg - Weston	235.6	0.1003	2.76	56,976	54,334	28,403	52	21,732	40	52	79
Cleveland	3,785.1	1.6072	2.69	1,957,267	1,722,094	689,359	40	905,450	53	96	95
Colorado Springs - Pueblo	562.4	0.2388	2.74	259,367	231,464	96,112	42	123,394	53	96	90
Columbia, S.C.	764.6	0.3248	2.95	269,008	256,914	133,604	52	100,311	39	101	103
Columbia - Jefferson City	390.0	0.1658	2.81	154,164	143,560	64,073	45	71,431	50	84	89
Columbus, Ga.	531.7	0.2259	2.93	162,734	152,037	83,828	55	57,747	38	88	96
Columbus - Tupelo	441.5	0.1875	2.93	93,004	88,419	49,273	56	34,616	39	50	97
Columbus, Ohio	1,681.6	0.7141	2.66	916,308	822,913	377,260	46	388,095	47	118	93
Corpus Christi	507.5	0.2155	3.08	215,580	185,932	80,597	43	92,998	50	71	82
Dallas - Ft. Worth	3,976.0	1.6885	2.70	2,522,466	2,331,167	1,050,774	45	1,048,618	45	127	109
Davenport - Rock Island - Moline	903.2	0.3834	2.66	417,745	344,055	148,643	43	171,140	50	98	71
Dayton	1,287.4	0.5465	2.67	628,007	570,213	264,502	46	263,268	46	105	85
Denver	2,510.7	1.0658	2.60	1,652,894	1,475,845	465,350	32	887,253	60	113	105
Des Moines	959.7	0.4074	2.60	437,643	376,382	158,508	42	180,873	48	81	80
Detroit	4,656.5	1.9772	2.80	2,132,503	1,905,122	727,061	38	1,008,442	53	89	100
Dothan	284.2	0.1208	2.84	71,001	69,148	39,691	57	25,999	38	60	89
Duluth - Superior	472.9	0.2009	2.71	194,935	152,319	47,558	31	95,448	63	78	75
El Centro - Yuma	187.5	0.0796	3.10	84,830	72,737	24,080	33	45,686	63	78	73
El Paso	715.9	0.3040	3.27	303,245	244,560	100,076	41	125,286	51	97	101
Elmira	241.3	0.1025	2.81	80,893	65,315	20,213	31	41,057	63	65	92
Erie	424.4	0.1803	2.80	156,634	129,376	54,183	42	68,660	53	96	92
Eugene	428.1	0.1819	2.60	215,495	190,285	75,942	40	98,769	52	92	76
Eureka	148.7	0.0632	2.53	87,491	75,896	26,147	34	46,834	62	86	62
Evansville	714.6	0.3035	2.71	289,082	254,487	129,605	51	104,136	41	81	95
Fargo	595.1	0.2527	2.80	273,853	219,740	78,228	36	125,236	57	103	80
Flagstaff	84.7	0.0360	3.23	65,059	60,402	19,246	32	38,488	64	183	108
Flint - Saginaw - Bay City	1,221.2	0.5182	2.88	527,216	443,626	173,303	39	237,465	54	86	97
Florence, S.C.	396.4	0.1683	2.93	172,425	165,610	83,417	50	71,845	43	112	115

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ADI Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Ft. Myers - Naples	448.9	0.1905	2.44	244,038	223,395	84,411	38	124,982	56	106	88
Ft. Smith	381.4	0.1620	2.77	150,312	144,713	81,204	56	52,467	36	90	71
Ft. Wayne	659.0	0.2797	2.84	339,438	303,839	123,300	41	162,948	54	119	83
Fresno	1,128.8	0.4792	2.91	489,931	441,505	169,871	38	254,113	58	81	78
Gainesville	204.0	0.0865	2.72	107,589	100,815	36,793	36	56,241	56	123	88
Glendive	13.8	0.0059	2.65	10,001	6,729	2,407	36	3,994	59	80	96
Grand Junction	151.0	0.0643	2.72	69,850	65,534	17,589	27	44,750	68	94	78
Grand Rapids - Kalamazoo - Battle Creek	1,607.4	0.6826	2.85	642,864	566,333	199,873	35	332,284	59	120	95
Great Falls	177.3	0.0753	2.67	101,112	71,720	24,581	34	41,921	58	83	71
Green Bay	985.8	0.4186	2.79	478,363	370,748	119,061	32	228,385	62	105	80
Greensboro - Winston-Salem - High Point	1,277.2	0.5423	2.70	569,690	555,504	271,021	49	217,174	39	104	94
Greenville - New Bern - Washington	637.7	0.2707	2.95	225,143	212,401	115,278	54	87,532	41	92	86
Greenville - Spartanburg - Asheville	1,620.0	0.6875	2.74	588,647	567,169	302,949	53	225,915	40	88	87
Greenwood - Greenville	252.1	0.1071	3.16	44,228	42,674	23,567	55	16,720	39	39	83
Hagerstown	114.6	0.0487	2.80	44,670	37,212	14,592	39	20,836	56	84	101
Harrisburg - York - Lancaster - Lebanon	1,367.6	0.5807	2.73	605,127	532,920	215,801	40	288,963	54	84	109
Harrisonburg	108.5	0.0462	2.92	31,303	29,547	14,817	50	12,668	43	62	83
Hartford - New Haven	2,226.6	0.9454	2.76	1,396,288	1,249,723	418,371	33	735,629	59	112	91
Houston	3,891.1	1.6522	2.78	2,254,823	2,022,394	927,218	46	945,566	47	99	132
Huntsville - Decatur - Florence	688.3	0.2922	2.74	227,780	218,927	128,092	59	75,185	34	78	98
Idaho Falls - Pocatello	329.1	0.1398	3.04	137,149	120,659	44,981	37	66,666	55	76	96
Indianapolis	2,204.3	0.9358	2.78	1,045,504	960,407	480,519	50	389,941	41	104	90
Jackson, Miss.	808.1	0.3429	2.95	229,586	220,653	117,624	53	77,787	35	64	107
Jackson, Tenn.	149.3	0.0633	2.75	55,241	52,326	25,347	48	24,196	46	75	96
Jacksonville	1,074.1	0.4561	2.77	477,454	444,082	222,853	50	191,366	43	108	107
Johnstown - Altoona	854.7	0.3631	2.80	288,157	246,709	100,318	41	131,700	53	72	87
Jonesboro	182.6	0.0775	2.73	47,903	46,708	25,267	54	17,706	38	65	58
Joplin - Pittsburg	456.5	0.1937	2.61	166,367	158,682	75,447	48	74,506	47	87	57
Kansas City	1,857.1	0.7882	2.65	907,897	850,312	395,579	47	381,543	45	103	102
Knoxville	1,142.2	0.4843	2.76	462,442	446,757	232,259	52	184,137	41	89	102
La Crosse - Eau Claire	451.8	0.1916	2.81	241,223	181,007	56,846	31	111,375	62	123	82
Lafayette, Ind.	133.0	0.0565	2.92	70,237	64,967	31,573	49	28,251	43	125	102
Lafayette, La.	567.3	0.2407	2.93	198,863	175,542	86,236	49	71,832	41	74	98
Lake Charles	220.0	0.0934	2.88	95,212	86,671	42,305	49	37,456	43	68	105
Lansing	613.3	0.2606	2.90	260,307	228,431	98,903	43	113,667	50	114	106
Laredo	121.6	0.0516	3.76	44,176	39,787	18,277	46	18,354	46	74	99
Las Vegas	533.3	0.2264	2.55	318,602	261,780	90,979	35	150,617	58	101	677
Laurel - Hattiesburg	231.7	0.0985	2.90	84,325	80,794	44,790	55	31,638	39	82	91
Lexington	882.9	0.3746	2.78	351,707	340,759	192,853	57	121,095	36	78	105
Lima	113.0	0.0480	2.76	58,257	53,859	23,411	43	26,326	49	114	78
Lincoln - Hastings - Kearney	678.1	0.2883	2.65	313,677	259,750	104,786	40	137,233	53	96	72
Little Rock	1,211.6	0.5145	2.78	371,922	361,765	199,019	55	133,021	37	75	84
Los Angeles	11,462.5	4.8667	2.75	7,604,252	7,106,826	2,449,126	34	4,084,024	57	124	101
Louisville	1,429.5	0.6071	2.77	683,799	628,831	341,356	54	229,147	36	91	99
Lubbock	456.1	0.1936	2.89	213,986	195,966	90,350	46	91,894	47	91	72
Macon	418.5	0.1777	2.93	157,104	148,332	76,859	52	60,581	41	89	94
Madison	519.5	0.2204	2.61	360,778	294,901	106,414	36	169,998	58	151	98
Mankato	64.8	0.0276	2.81	41,529	33,121	9,740	29	21,273	64	98	60
Marquette	158.6	0.0674	2.90	63,887	46,877	16,781	36	28,193	60	74	82

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ADI Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
McAllen - Brownsville	624.0	0.2650	3.64	166,343	144,414	73,201	51	59,201	41	59	95
Medford	309.7	0.1315	2.63	136,800	120,284	42,446	35	72,354	60	78	61
Memphis	1,620.3	0.6880	2.91	558,861	531,460	257,524	48	224,027	42	76	96
Meridian	227.7	0.0967	2.89	50,281	48,553	27,833	57	18,127	37	50	101
Miami	2,951.9	1.2533	2.59	1,868,105	1,718,323	514,874	30	1,054,873	61	141	123
Milwaukee	1,877.9	0.7973	2.72	1,100,620	910,565	297,510	33	534,091	59	111	101
Minneapolis - St. Paul	3,192.3	1.3555	2.77	1,671,482	1,444,654	466,280	32	965,289	60	102	112
Minot - Bismarck - Dickinson	399.4	0.1697	2.84	171,146	125,504	46,271	37	69,511	55	88	89
Missoula - Butte	362.7	0.1539	2.65	240,559	175,135	58,952	34	101,752	58	96	85
Mobile - Pensacola	1,161.1	0.4929	2.87	464,704	419,292	219,230	52	166,850	40	95	104
Monroe - El Dorado	535.3	0.2272	2.85	131,592	121,849	60,703	50	49,739	41	62	84
Montgomery	491.3	0.2087	2.85	162,033	154,768	89,595	58	49,100	32	84	110
Nashville	1,793.3	0.7616	2.80	819,793	789,988	348,733	44	379,707	48	100	106
New Orleans	1,768.5	0.7507	2.80	1,031,211	923,424	415,178	45	436,884	47	103	137
New York	18,025.8	7.6535	2.72	8,652,082	7,626,673	2,192,461	29	4,831,362	63	90	102
Norfolk - Portsmouth - Newport News - Hampton	1,461.3	0.6205	2.92	707,140	681,817	335,107	49	306,969	45	113	98
North Platte	43.4	0.0183	2.71	19,977	18,002	7,029	39	9,756	54	86	90
Odessa - Midland	376.1	0.1599	2.84	222,213	198,894	92,373	46	92,856	47	92	79
Oklahoma City	1,576.9	0.6700	2.65	887,075	848,175	439,551	52	340,536	40	122	77
Omaha	932.4	0.3958	2.69	456,260	379,188	153,884	41	193,244	51	93	82
Orlando - Daytona Beach	1,702.0	0.7225	2.61	1,012,383	935,157	378,851	41	487,109	52	130	127
Ottumwa - Kirksville	77.6	0.0329	2.67	23,327	20,380	9,039	44	10,560	52	66	63
Paducah - Cape Girardeau - Harrisburg	895.0	0.3798	2.62	307,252	279,797	134,584	48	131,026	47	68	74
Palm Springs	745.4	0.3169	2.71	427,102	400,654	132,802	33	235,770	59	104	92
Panama City	176.8	0.0751	2.72	97,829	88,571	32,496	37	49,599	56	137	100
Parkersburg	93.4	0.0397	2.68	39,786	37,721	19,219	51	15,422	41	69	90
Peoria	587.7	0.2497	2.69	284,118	243,812	106,796	44	121,756	50	99	92
Philadelphia	7,031.3	2.9852	2.77	3,454,623	2,948,522	1,020,620	35	1,697,144	58	94	118
Phoenix	2,084.7	0.8851	2.67	1,107,078	987,783	353,200	36	551,774	56	101	106
Pittsburgh	3,322.3	1.4104	2.68	1,339,924	1,120,286	395,729	35	638,651	57	83	101
Portland, Ore.	2,085.8	0.8855	2.59	1,204,101	1,060,694	376,492	35	597,668	56	133	87
Portland - Poland Spring	860.4	0.3654	2.71	466,022	447,369	148,005	33	266,326	60	100	85
Presque Isle	88.3	0.0375	2.97	30,564	28,532	9,761	34	16,647	58	65	85
Providence - New Bedford	1,545.5	0.6563	2.74	866,494	766,971	248,005	32	467,306	61	106	83
Quincy - Hannibal	332.6	0.1413	2.65	114,025	92,527	41,256	45	46,582	50	71	64
Raleigh - Durham	1,667.5	0.7081	2.84	695,710	674,134	337,757	50	283,081	42	103	96
Rapid City	265.6	0.1130	2.79	153,638	125,475	42,517	34	73,074	58	99	102
Reno	380.8	0.1618	2.50	240,136	209,833	73,253	35	122,112	58	116	411
Richmond	1,244.9	0.5282	2.82	510,884	498,719	237,418	48	222,235	45	90	96
Roanoke - Lynchburg	1,001.3	0.4254	2.83	322,227	316,426	152,477	48	141,557	45	72	94
Rochester, N.Y.	956.1	0.4058	2.76	452,690	396,626	122,129	31	247,940	63	82	104
Rochester - Mason City - Austin	385.0	0.1637	2.65	163,406	141,961	48,946	34	83,877	59	90	80
Rockford	517.5	0.2196	2.70	235,821	205,122	70,121	34	122,760	60	96	92
Roswell	165.3	0.0703	2.83	67,827	61,200	25,647	42	31,408	51	72	83
Sacramento - Stockton	2,465.4	1.0468	2.64	1,465,862	1,329,351	487,314	37	750,547	56	102	85
St. Joseph	135.3	0.0575	2.64	57,922	51,354	22,906	45	24,865	48	81	68
St. Louis	2,865.1	1.2164	2.74	1,326,807	1,180,364	545,425	46	539,680	46	83	96
Salinas - Monterey	559.7	0.2375	2.84	365,164	337,547	100,016	30	216,986	64	122	86
Salisbury	224.8	0.0955	2.74	147,751	132,402	50,139	38	74,681	56	104	80
Salt Lake City	1,775.4	0.7539	3.23	653,876	613,263	268,075	44	299,191	49	89	98
San Angelo	117.0	0.0496	2.78	67,582	59,477	27,567	46	27,554	46	83	76

ADI Name	12/31/83 Population (Thous.)	% Of U.S.	Average House-hold Size	1983 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
San Antonio	1,567.2	0.6652	3.00	721,634	633,132	272,475	43	307,435	49	90	89
San Diego	2,036.1	0.8645	2.72	1,281,599	1,167,538	445,134	38	663,868	57	127	109
San Francisco	5,303.3	2.2518	2.56	4,250,622	3,860,630	1,227,339	32	2,259,819	59	129	107
Santa Barbara - Santa Maria - San Luis Obispo	493.7	0.2096	2.66	387,223	365,195	108,032	30	240,606	66	142	85
Sarasota	233.5	0.0992	2.25	175,539	164,282	44,955	27	104,684	64	135	92
Savannah	587.0	0.2492	2.99	223,038	199,988	103,879	52	82,135	41	98	112
Seattle - Tacoma	2,977.8	1.2643	2.60	1,931,816	1,743,230	551,903	32	1,046,343	60	121	96
Selma	51.9	0.0220	2.97	13,789	13,062	8,104	62	4,225	32	61	84
Shreveport - Texarkana	1,275.6	0.5418	2.77	445,502	418,108	207,503	50	179,394	43	76	88
Sioux City	399.0	0.1696	2.68	158,931	127,588	52,661	41	66,069	52	73	69
Sioux Falls - Mitchell	629.8	0.2671	2.70	262,950	214,330	70,874	33	128,044	60	90	69
South Bend - Elkhart	778.1	0.3303	2.80	367,031	322,253	135,197	42	163,988	51	98	75
Spokane	893.1	0.3791	2.68	401,505	333,208	124,515	37	188,925	57	81	83
Springfield, Mass.	647.8	0.2750	2.77	336,363	288,074	85,202	30	177,626	62	74	85
Springfield, Mo.	753.6	0.3198	2.69	252,370	237,176	113,893	48	107,704	45	79	63
Springfield - Decatur - Champaign	924.5	0.3923	2.62	474,512	406,621	167,627	41	210,974	52	97	90
Syracuse	959.3	0.4075	2.85	424,182	365,454	110,424	30	226,468	62	72	91
Tallahassee	448.6	0.1906	2.88	168,331	159,229	68,374	43	79,874	50	91	106
Tampa - St. Petersburg	2,473.1	1.0502	2.49	1,295,746	1,181,110	458,540	39	613,322	52	105	106
Terre Haute	438.2	0.1858	2.66	142,502	122,717	57,870	47	55,930	46	72	74
Toledo	1,132.3	0.4808	2.75	616,212	543,412	220,561	41	277,628	51	108	85
Topeka	403.5	0.1713	2.68	165,557	148,698	70,615	47	67,981	46	95	75
Traverse City - Cadillac	414.0	0.1757	2.75	192,983	155,254	55,918	36	93,375	60	87	68
Tucson	708.1	0.3006	2.63	318,016	278,549	108,870	39	152,219	55	88	88
Tulsa	1,202.4	0.5102	2.66	557,557	535,236	266,457	50	224,087	42	100	89
Tuscaloosa	142.3	0.0604	2.83	54,961	52,677	30,665	58	17,714	34	101	96
Twin Falls	75.4	0.0321	2.87	27,398	24,907	9,243	37	13,877	56	88	78
Tyler	283.9	0.1206	2.83	99,981	96,880	44,755	46	45,187	47	65	89
Utica	381.8	0.1620	2.84	178,617	148,396	54,639	37	83,251	56	75	72
Victoria	77.5	0.0329	2.95	46,886	38,963	18,535	48	18,766	48	101	84
Waco - Temple	653.0	0.2773	2.87	293,418	268,155	123,558	46	123,924	46	104	81
Washington, D.C.	4,053.8	1.7212	2.74	2,230,945	2,110,246	796,685	38	1,144,355	54	112	127
Watertown - Carthage	232.9	0.0990	3.00	85,602	66,140	20,223	31	42,466	64	59	77
Wausau - Rhinelander	440.5	0.1871	2.80	185,572	136,642	39,207	29	89,100	65	84	79
West Palm Beach	939.3	0.3988	2.45	553,901	493,554	147,888	30	318,061	64	121	110
Wheeling - Steubenville	452.6	0.1921	2.71	170,871	141,063	65,162	46	64,912	46	71	84
Wichita - Hutchinson	1,093.5	0.4642	2.59	479,504	449,406	216,127	48	198,806	44	96	70
Wichita Falls - Lawton	455.6	0.1935	2.82	181,917	169,165	81,756	48	75,199	44	88	69
Wilkes-Barre - Scranton	1,308.2	0.5555	2.70	404,323	341,908	133,515	39	186,520	55	69	72
Wilmington	364.0	0.1545	2.88	128,370	125,042	65,471	52	51,167	41	86	87
Yakima	481.3	0.2043	2.75	237,123	204,255	68,303	33	121,906	60	87	84
Youngstown	649.4	0.2757	2.72	289,470	247,611	109,504	44	121,773	49	86	80
Zanesville	84.4	0.0358	2.71	31,724	25,506	11,120	44	12,487	49	70	72
Total ADIs	233,991.3	99.3491	2.75	117,287,708	105,454,068	41,037,951	39	56,227,656	53	100	99

The following segment of the Restaurant Growth Index ranks the top 100 restaurant, fast food, RAI and RGI markets in 1983 by metro area and by ADI. For a list of countries which comprise each metro area according to Federal government definition, see page 168.

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Top 100 Restaurant Markets - 1983

By Metro Area

Metro Area Name	Sales ($000)	Ranking
Los Angeles - Long Beach	2,800,939	1
New York	2,309,876	2
Chicago	1,763,891	3
Boston - Lawrence - Salem - Lowell - Brockton	1,529,236	4
Philadelphia	1,065,510	5
Washington	1,040,240	6
San Francisco	967,270	7
Detroit	933,755	8
Anaheim - Santa Ana	921,057	9
Houston	825,374	10
Seattle	711,165	11
Minneapolis - St. Paul	677,195	12
Dallas	667,168	13
Nassau - Suffolk	664,989	14
San Diego	663,868	15
Denver	572,931	16
Oakland	563,414	17
San Jose	548,518	18
Miami - Hialeah	520,315	19
Atlanta	510,966	20
Fort Lauderdale - Hollywood - Pompano Beach	506,943	21
Cleveland	497,545	22
Pittsburgh	496,371	23
Phoenix	476,700	24
Tampa - St. Petersburg - Clearwater	471,109	25
Riverside - San Bernardino	434,928	26
Baltimore	431,876	27
Sacramento	426,845	28
Newark	421,068	29
Milwaukee	418,821	30
Honolulu	414,385	31
Bergen - Passaic	405,483	32
St. Louis	386,476	33
New Orleans	372,887	34
Portland, Ore	357,358	35
Hartford - New Britain - Middletown - Bristol	353,600	36
Cincinnati	347,988	37
Kansas City	335,447	38
Bridgeport - Stamford - Norwalk - Danbury	325,945	39
Columbus, Ohio	325,784	40
Fort Worth - Arlington	297,636	41
Norfolk - Virginia Beach - Newport News	271,546	42
Nashville	269,042	43
Buffalo	267,148	44
San Antonio	266,292	45
Providence - Pawtucket - Woonsocket	263,110	46
New Haven - Waterbury - Meriden	260,530	47
West Palm Beach - Boca Raton - Delray Beach	256,565	48
Monmouth - Ocean	255,326	49
Rochester, N.Y.	251,298	50
Orlando	248,394	51
Oklahoma City	234,388	52
Albany - Schenectady - Troy	220,031	53
Indianapolis	218,541	54
Dayton - Springfield	207,317	55
Middlesex - Somerset - Hunterdon	196,716	56
Toledo	185,781	57
Louisville	182,803	58
Charlotte - Gastonia - Rock Hill	181,926	59
Austin	175,580	60
Memphis	172,993	61
Syracuse	172,604	62
Atlantic City	169,187	63
Akron	167,311	64
Greensboro - Winston-Salem - High Point	166,421	65
Richmond - Petersburg	165,168	66
Santa Barbara - Santa Maria - Lompoc	164,693	67
Worcester - Fitchburg - Leominster	163,658	68
Salt Lake City - Ogden	162,023	69
Springfield, Mass.	160,547	70
Grand Rapids	155,383	71
Oxnard - Ventura	153,604	72
Las Vegas	149,875	73
Tulsa	147,858	74
Omaha	147,364	75
Jacksonville, Fla.	146,165	76
Gary - Hammond	144,159	77
Raleigh - Durham	142,116	78
Allentown - Bethlehem	138,707	79
Scranton - Wilkes-Barre	138,584	80
Bakersfield	135,262	81
Salinas - Seaside - Monterey	134,378	82
Fresno	132,970	83
Harrisburg - Lebanon - Carlisle	132,748	84
Tucson	132,028	85
New Bedford - Fall River - Attleboro	127,272	86
Madison	125,368	87
Knoxville	124,716	88
Birmingham	123,886	89
Albuquerque	121,955	90
Fort Wayne	118,169	91
Portsmouth - Dover - Rochester	116,823	92
Santa Rosa - Petaluma	112,824	93
Wilmington, Del.	112,567	94
Tacoma	112,163	95
Lake County, Ill.	112,144	96
Vallejo - Fairfield - Napa	111,380	97
Anchorage	104,684	98
Sarasota	104,684	98
Manchester - Nashua	102,677	100

By ADI

ADI Name	Sales ($000)	Ranking
New York	4,831,362	1
Los Angeles	4,084,024	2
Chicago	2,291,353	3
San Francisco	2,259,819	4
Boston	2,184,957	5
Philadelphia	1,697,144	6
Washington, D.C.	1,144,355	7
Miami	1,054,873	8
Dallas - Ft. Worth	1,048,618	9
Seattle - Tacoma	1,046,343	10
Detroit	1,008,442	11
Houston	945,566	12
Cleveland	905,450	13
Denver	887,253	14
Minneapolis - St. Paul	865,289	15
Sacramento - Stockton	750,547	16
Hartford - New Haven	735,629	17
San Diego	663,868	18
Pittsburgh	638,651	19
Tampa - St. Petersburg	613,322	20
Atlanta	604,470	21
Portland, Ore.	597,668	22
Phoenix	551,774	23
St. Louis	539,680	24
Milwaukee	534,091	25
Orlando - Daytona Beach	487,109	26
Baltimore	469,087	27
Providence - New Bedford	467,306	28
New Orleans	436,884	29
Cincinnati	408,452	30
Buffalo	407,261	31
Indianapolis	389,941	32
Columbus, Ohio	388,095	33
Kansas City	381,543	34
Nashville	379,707	35
Oklahoma City	340,536	36
Albany - Schenectady - Troy	339,328	37
Grand Rapids - Kalamazoo - Battle Creek	332,284	38
West Palm Beach	318,061	39
San Antonio	307,435	40
Norfolk - Portsmouth - Newport News - Hampton	306,969	41
Salt Lake City	299,191	42
Harrisburg - York - Lancaster - Lebanon	288,963	43
Charlotte	283,279	44
Raleigh - Durham	283,081	45
Toledo	277,628	46
Albuquerque	272,049	47
Portland - Poland Spring	266,326	48
Dayton	263,268	49
Fresno	254,113	50
Rochester, N.Y.	247,940	51
Santa Barbara - Santa Maria - San Luis Obispo	240,606	52
Flint - Saginaw - Bay City	237,465	53
Palm Springs	235,770	54
Louisville	229,147	55
Green Bay	228,385	56
Syracuse	226,468	57
Greenville - Spartanburg - Asheville	225,915	58
Tulsa	224,087	59
Memphis	224,027	60
Richmond	222,235	61
Greensboro - Winston-Salem - High Point	217,174	62
Salinas - Monterey	216,986	63
Springfield - Decatur - Champaign	210,974	64
Wichita - Hutchinson	198,806	65
Omaha	193,244	66
Austin, Tex.	191,961	67
Jacksonville	191,366	68
Spokane	188,925	69
Burlington - Plattsburgh	187,635	70
Wilkes-Barre - Scranton	186,520	71
Knoxville	184,137	72
Des Moines	180,873	73
Shreveport - Texarkana	179,394	74
Springfield, Mass.	177,626	75
Davenport - Rock Island - Moline	171,140	76
Madison	169,998	77
Mobile - Pensacola	166,850	78
Cedar Rapids - Waterloo - Dubuque	164,951	79
South Bend - Elkhart	163,988	80
Ft. Wayne	162,948	81
Birmingham	154,486	82
Tucson	152,219	83
Las Vegas	150,617	84
Charleston - Huntington	148,239	85
Roanoke - Lynchburg	141,557	86
Lincoln - Hastings - Kearney	137,233	87
Bakersfield	135,262	88
Little Rock	133,021	89
Johnstown - Altoona	131,700	90
Paducah - Cape Girardeau - Harrisburg	131,026	91
Sioux Falls - Mitchell	128,044	92
Chattanooga	125,605	93
El Paso	125,286	94
Fargo	125,236	95
Ft. Myers - Naples	124,982	96
Waco - Temple	123,924	97
Colorado Springs - Pueblo	123,394	98
Rockford	122,760	99
Reno	122,112	100

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Top 100 Fast Food Markets - 1983

Metro Area Name	Sales ($000)	Ranking
Los Angeles - Long Beach	1,590,927	1
Chicago	1,134,126	2
New York	958,389	3
Houston	797,700	4
Washington	696,017	5
Detroit	674,057	6
Philadelphia	651,354	7
Boston - Lawrence - Salem - Lowell - Brockton	627,734	8
Dallas	602,858	9
Atlanta	599,212	10
Anaheim - Santa Ana	530,730	11
San Diego	445,134	12
Baltimore	395,753	13
San Francisco	394,966	14
Minneapolis - St. Paul	383,576	15
St. Louis	382,013	16
San Jose	371,645	17
Fort Worth - Arlington	363,037	18
Oakland	362,664	19
Seattle	358,065	20
Kansas City	351,695	21
Cleveland	346,396	22
Riverside - San Bernardino	345,823	23
Tampa - St. Petersburg - Clearwater	341,891	24
Nassau - Suffolk	339,163	25
New Orleans	331,487	26
Cincinnati	329,523	27
Columbus, Ohio	321,618	28
Oklahoma City	318,310	29
Phoenix	315,521	30
Indianapolis	298,739	31
Denver	296,308	32
Norfolk - Virginia Beach - Newport News	290,391	33
Louisville	281,695	34
Pittsburgh	281,561	35
Miami - Hialeah	270,708	36
Sacramento	269,813	37
Honolulu	246,460	38
Milwaukee	242,554	39
San Antonio	231,571	40
Charlotte - Gastonia - Rock Hill	230,306	41
Portland, Ore.	227,100	42
Fort Lauderdale - Hollywood - Pompano Beach	224,438	43
Nashville	222,724	44
Hartford - New Britain - Middletown - Bristol	214,793	45
Orlando	214,175	46
Dayton - Springfield	211,522	47
Newark	209,360	48
Bergen - Passaic	206,697	49
Greensboro - Winston-Salem - High Point	205,486	50
Memphis	193,780	51
Birmingham	186,063	52
Tulsa	179,798	53
Jacksonville, Fla.	173,311	54
Richmond - Petersburg	172,360	55
Salt Lake City - Ogden	172,187	56
Knoxville	162,539	57
Austin	159,467	58
Raleigh - Durham	155,037	59
Greenville - Spartanburg	147,639	60
Toledo	146,564	61
New Haven - Waterbury - Meriden	145,349	62
Gary - Hammond	144,540	63
Buffalo	144,124	64
Akron	133,286	65
Providence - Pawtucket - Woonsocket	132,664	66
Rochester, N.Y.	123,854	67
Baton Rouge	120,164	68
Omaha	118,750	69
Bridgeport - Stamford - Norwalk - Danbury	118,724	70
Middlesex - Somerset - Hunterdon	118,012	71
Monmouth - Ocean	117,117	72
Wichita	113,641	73
Oxnard - Ventura	109,305	74
Lexington-Fayette	107,898	75
Albuquerque	107,646	76
Allentown - Bethlehem	107,340	77
Little Rock - North Little Rock	105,932	78
Harrisburg - Lebanon - Carlisle	105,275	79
Albany - Schenectady - Troy	104,428	80
West Palm Beach - Boca Raton - Delray Beach	103,919	81
Johnson City - Kingsport - Bristol	103,451	82
Fresno	102,602	83
Tucson	98,753	84
Columbia, S.C.	97,078	85
Beaumont - Port Arthur	96,105	86
Youngstown - Warren	94,802	87
Mobile	93,629	88
Las Vegas	90,530	89
Shreveport	88,845	90
Scranton - Wilkes-Barre	87,766	91
Charleston, S.C.	87,488	92
Bakersfield	87,369	93
Lake County, Ill.	87,130	94
Madison	86,775	95
Chattanooga	85,699	96
Syracuse	84,858	97
Wilmington, Del.	83,506	98
Fort Wayne	82,655	99
Anchorage	80,270	100

ADI Name	Sales ($000)	Ranking
Los Angeles	2,449,126	1
New York	2,192,461	2
Chicago	1,563,215	3
San Francisco	1,227,339	4
Dallas - Ft. Worth	1,050,774	5
Philadelphia	1,020,620	6
Houston	927,118	7
Boston	882,760	8
Washington, D.C.	796,685	9
Atlanta	736,748	10
Detroit	727,061	11
Cleveland	589,359	12
Seattle - Tacoma	551,903	13
St. Louis	545,475	14
Miami	514,874	15
Sacramento - Stockton	487,314	16
Indianapolis	480,519	17
Minneapolis - St. Paul	466,280	18
Denver	465,350	19
Tampa - St. Petersburg	458,540	20
San Diego	445,134	21
Oklahoma City	439,551	22
Hartford - New Haven	418,371	23
Cincinnati	417,605	24
Baltimore	416,861	25
New Orleans	415,178	26
Pittsburgh	395,729	27
Kansas City	395,579	28
Orlando - Daytona Beach	378,851	29
Columbus, Ohio	373,260	30
Portland, Ore.	376,492	31
Charlotte	362,336	32
Phoenix	353,200	33
Nashville	348,733	34
Louisville	341,356	35
Raleigh - Durham	337,757	36
Norfolk - Portsmouth - Newport News - Hampton	335,107	37
Greenville - Spartanburg - Asheville	302,949	38
Milwaukee	297,510	39
San Antonio	272,475	40
Greensboro - Winston-Salem - High Point	271,021	41
Salt Lake City	268,075	42
Tulsa	266,457	43
Dayton	264,502	44
Memphis	257,524	45
Providence - New Bedford	248,005	46
Birmingham	242,729	47
Richmond	237,418	48
Knoxville	232,259	49
Jacksonville	222,853	50
Toledo	220,561	51
Mobile - Pensacola	219,230	52
Buffalo	218,379	53
Wichita - Hutchinson	216,127	54
Harrisburg - York - Lancaster - Lebanon	215,801	55
Albuquerque	213,684	56
Shreveport - Texarkana	207,503	57
Grand Rapids - Kalamazoo - Battle Creek	199,873	58
Little Rock	199,019	59
Charleston - Huntington	195,089	60
Lexington	192,853	61
Austin, Tex.	175,741	62
Flint - Saginaw - Bay City	173,303	63
Fresno	169,871	64
Springfield - Decatur - Champaign	167,627	65
Albany - Schenectady - Troy	162,406	66
Des Moines	158,508	67
Omaha	153,884	68
Roanoke - Lynchburg	152,477	69
Davenport - Rock Island - Moline	148,643	70
Portland - Poland Spring	148,005	71
West Palm Beach	147,888	72
Baton Rouge	146,117	73
Chattanooga	139,425	74
South Bend - Elkhart	135,197	75
Paducah - Cape Girardeau - Harrisburg	134,584	76
Columbia, S.C.	133,604	77
Wilkes-Barre - Scranton	133,515	78
Palm Springs	132,802	79
Bristol - Kingsport - Johnson City	131,775	80
Cedar Rapids - Waterloo - Dubuque	130,287	81
Evansville	129,605	82
Huntsville - Decatur - Florence	128,092	83
Spokane	124,515	84
Waco - Temple	123,558	85
Ft. Wayne	123,300	86
Rochester, N.Y.	122,129	87
Green Bay	119,061	88
Jackson, Miss.	117,624	89
Greenville - New Bern - Washington	115,278	90
Springfield, Mo.	113,893	91
Syracuse	110,424	92
Youngstown	109,504	93
Tucson	108,870	94
Amarillo	108,719	95
Santa Barbara - Santa Maria - San Luis Obispo	108,032	96
Peoria	106,796	97
Madison	106,414	98
Lincoln - Hastings - Kearney	104,786	99
Savannah	103,879	100

Top 100 RAI Markets - 1983

Metro Area Name	RAI	Ranking
Honolulu	228	1
Panama City	223	2
La Crosse	205	3
Jacksonville, N C	185	4
Bryan - College Station	178	5
Madison	178	5
Bellingham	176	7
Fort Lauderdale - Hollywood - Pompano Beach	170	8
Battle Creek	169	9
Fort Walton Beach	169	9
Ann Arbor	165	11
Fort Worth - Arlington	164	12
San Francisco	164	12
Grand Rapids	158	14
Huntsville	155	15
Santa Barbara - Santa Maria - Lompoc	155	15
Grand Forks	154	17
Enid	150	18
Kalamazoo	150	18
Santa Fe	149	20
Portland, Ore	148	21
Fort Wayne	146	22
Bradenton	145	23
Champaign - Urbana - Rantoul	144	24
Salinas - Seaside - Monterey	144	24
Daytona Beach	143	26
Oklahoma City	143	26
Orlando	142	28
Eau Claire	139	29
Fargo - Moorhead	137	30
Anaheim - Santa Ana	136	31
Burlington, Vt	136	31
Salem, Ore	136	31
Sarasota	135	34
Dallas	134	35
Seattle	134	35
Wichita	134	35
Anchorage	133	38
Gainesville	132	39
West Palm Beach - Boca Raton - Delray Beach	132	39
Columbus, Ohio	130	41
Raleigh - Durham	130	41
Lafayette, Ind	129	43
Bloomington, Ind	128	44
Savannah	128	44
Shreveport	128	44
Albuquerque	127	47
Atlanta	127	47
Chicago	127	47
San Diego	127	47
San Jose	127	47
Wilmington, N C	127	47
Knoxville	126	53
Los Angeles - Long Beach	126	53
Melbourne - Titusville - Palm Bay	126	53
Muncie	126	53
Muskegon	126	53
Amarillo	125	58
Nashville	125	58
Atlantic City	124	60
Clarksville - Hopkinsville	124	60
Sioux Falls	124	60
Norfolk - Virginia Beach - Newport News	123	63
Boston - Lawrence - Salem - Lowell - Brockton	122	64
Columbia, S C	122	64
Odessa	122	64
Miami - Hialeah	121	67
Athens	120	68
Austin	120	68
Naples	120	68
Columbia, Mo	119	71
Lansing - East Lansing	119	71
Toledo	119	71
Boise	118	74
Boulder - Longmont	118	74
Davenport - Rock Island - Moline	118	74
Jacksonville, Fla	118	74
Reno	118	74
Asheville	117	79
Hartford - New Britain - Middletown - Bristol	117	79
Lubbock	117	79
Rochester, Minn	117	79
Washington	117	79
Greenville - Spartanburg	116	84
Jackson, Mich	116	84
Montgomery	116	84
South Bend - Mishawaka	116	84
Fayetteville, N C	115	88
Green Bay	115	88
Lincoln	115	88
Milwaukee	115	88
Bloomington - Normal	114	92
Kankakee	114	92
Bismarck	113	94
Cincinnati	113	94
Denver	113	94
Greensboro - Winston-Salem - High Point	113	94
Ocala	113	94
Tallahassee	113	94
Fort Collins - Loveland	112	100
Killeen - Temple	112	100
New Haven - Waterbury - Meriden	112	100
Pensacola	112	100

ADI Name	RAI	Ranking
Flagstaff	183	1
Madison	151	2
Santa Barbara - Santa Maria - San Luis Obispo	142	3
Miami	141	4
Panama City	137	5
Sarasota	135	6
Portland, Ore	133	7
Orlando - Daytona Beach	130	8
San Francisco	129	9
Dallas - Ft Worth	127	10
San Diego	127	10
Lafayette, Ind	125	12
Los Angeles	124	13
Gainesville	123	14
La Crosse - Eau Claire	123	14
Oklahoma City	122	16
Salinas - Monterey	122	16
Seattle - Tacoma	121	18
West Palm Beach	121	18
Chicago	120	20
Grand Rapids - Kalamazoo - Battle Creek	120	20
Ft Wayne	119	22
Columbus, Ohio	118	23
Atlanta	116	24
Reno	116	24
Boston	115	26
Lansing	114	27
Lima	114	27
Denver	113	29
Norfolk - Portsmouth - Newport News - Hampton	113	29
Austin, Tex	112	31
Florence, S C	112	31
Hartford - New Haven	112	31
Washington, D C	112	31
Milwaukee	111	35
Jacksonville	108	36
Toledo	108	36
Ft Myers - Naples	106	38
Providence - New Bedford	106	38
Charleston, S C	105	40
Dayton	105	40
Green Bay	105	40
Tampa - St Petersburg	105	40
Albuquerque	104	44
Greensboro - Winston-Salem - High Point	104	44
Indianapolis	104	44
Palm Springs	104	44
Salisbury	104	44
Waco - Temple	104	44
Fargo	103	50
Kansas City	103	50
New Orleans	103	50
Raleigh - Durham	103	50
Minneapolis - St Paul	102	54
Sacramento - Stockton	102	54
Columbia, S C	101	56
Las Vegas	101	56
Phoenix	101	56
Tuscaloosa	101	56
Victoria	101	56
Cincinnati	100	61
Nashville	100	61
Portland - Poland Spring	100	61
Tulsa	100	61
Biloxi - Gulfport - Pascagoula	99	65
Houston	99	65
Peoria	99	65
Rapid City	99	65
Davenport - Rock Island - Moline	98	69
Mankato	98	69
Savannah	98	69
South Bend - Elkhart	98	69
Wichita - Hutchinson	98	69
Amarillo	97	74
Cheyenne	97	74
El Paso	97	74
Springfield - Decatur - Champaign	97	74
Cleveland	96	78
Colorado Springs - Pueblo	96	78
Erie	96	78
Lincoln - Hastings - Kearney	96	78
Missoula - Butte	96	78
Rockford	96	78
Charlotte	95	84
Mobile - Pensacola	95	84
Topeka	95	84
Grand Junction	94	87
Philadelphia	94	87
Burlington - Plattsburgh	93	89
Omaha	93	89
Anniston	92	91
Billings - Hardin	92	91
Boise	92	91
Eugene	92	91
Greenville - New Bern - Washington	92	91
Odessa - Midland	92	91
Casper - Riverton	91	97
Cedar Rapids - Waterloo - Dubuque	91	97
Louisville	91	97
Lubbock	91	97
Tallahassee	91	97

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Top 100 RGI Markets - 1983

Metro Area Name	RGI	Ranking
Las Vegas	684	1
Reno	401	2
Atlantic City	224	3
Aurora - Elgin	188	4
Casper	174	5
Rochester, Minn	173	6
Honolulu	168	7
Orlando	165	8
Anchorage	158	9
Iowa City	149	10
New Orleans	143	11
Houston	141	12
Miami - Hialeah	139	13
Washington	136	14
Minneapolis - St. Paul	133	15
Baton Rouge	129	16
Brazoria	128	17
Huntsville	128	17
Bremerton	125	19
Madison	125	19
Ann Arbor	123	21
Houma - Thibodaux	123	21
Dallas	122	23
West Palm Beach - Boca Raton - Delray Beach	122	23
Bismarck	120	25
Newark	120	25
Richland - Kennewick - Pasco	120	25
San Jose	120	25
Atlanta	118	29
Beaver County, Pa	118	29
Charleston, S.C.	118	29
Trenton	118	29
Denver	117	33
Montgomery	117	33
Nashville	117	33
Lansing - East Lansing	116	36
Tallahassee	116	36
Florence, S.C.	115	38
Jackson, Miss.	115	38
Lexington-Fayette	115	38
Phoenix	115	38
Pensacola	114	42
Grand Forks	113	43
Lancaster	113	43
Philadelphia	113	43
Burlington, Vt.	112	46
Knoxville	112	46
Lafayette, La.	112	46
San Francisco	112	46
Tampa - St. Petersburg - Clearwater	112	46
Albany, Ga.	111	51
Chicago	111	51
Fargo - Moorhead	111	51
Harrisburg - Lebanon - Carlisle	111	51
Kansas City	111	51
Shreveport	111	51
Boston - Lawrence - Salem - Lowell - Brockton	110	57
Middlesex - Somerset - Hunterdon	110	57
Sioux Falls	110	57
Charleston, W.Va.	109	60
Grand Rapids	109	60
Jersey City	109	60
San Diego	109	60
Wausau	109	60
Binghamton	108	65
Cedar Rapids	108	65
Kalamazoo	108	65
Wilmington, Del.	108	65
Chattanooga	107	69
Columbia, Mo.	107	69
Des Moines	107	69
El Paso	107	69
Flint	107	69
Jacksonville, Fla.	107	69
Lake Charles	107	69
Laredo	107	69
Lincoln	107	69
Manchester - Nashua	107	69
Milwaukee	107	69
Panama City	107	69
Saginaw - Bay City - Midland	107	69
St. Louis	107	69
Springfield, Ill.	107	69
Baltimore	106	84
Bangor	106	84
Fort Lauderdale - Hollywood - Pompano Beach	106	84
Indianapolis	106	84
Memphis	106	84
Savannah	106	84
Evansville	105	90
Fort Worth - Arlington	105	90
Lafayette, Ind.	105	90
Mobile	105	90
Raleigh - Durham	105	90
Seattle	105	90
Louisville	104	96
New York	104	96
Oxnard - Ventura	104	96
Pittsburgh	104	96
Biloxi - Gulfport	103	100
Charlotte - Gastonia - Rock Hill	103	100
Cincinnati	103	100
Decatur	103	100
Galveston - Texas City	103	100
Rochester, N.Y.	103	100
Spokane	103	100
York	103	100

ADI Name	RGI	Ranking
Las Vegas	677	1
Reno	411	2
Casper - Riverton	143	3
New Orleans	137	4
Houston	132	5
Baton Rouge	129	6
Orlando - Daytona Beach	127	7
Washington, D.C.	127	7
Miami	123	9
Philadelphia	118	10
Florence, S.C.	115	11
Charleston, S.C.	113	12
Minneapolis - St. Paul	112	13
Savannah	112	13
Atlanta	110	15
Montgomery	110	15
West Palm Beach	110	15
Dallas - Ft. Worth	109	18
Harrisburg - York - Lancaster - Lebanon	109	18
San Diego	109	18
Chicago	108	21
Flagstaff	108	21
Jackson, Miss.	107	23
Jacksonville	107	23
San Francisco	107	23
Lansing	106	26
Nashville	106	26
Phoenix	106	26
Tallahassee	106	26
Tampa - St. Petersburg	106	26
Cheyenne	105	31
Denver	105	31
Lake Charles	105	31
Lexington	105	31
Baltimore	104	35
Bluefield - Beckley - Oak Hill	104	35
Mobile - Pensacola	104	35
Rochester, N.Y.	104	35
Augusta	103	39
Boston	103	39
Columbia, S.C.	103	39
Kansas City	102	42
Knoxville	102	42
Lafayette, Ind.	102	42
New York	102	42
Rapid City	102	42
Chattanooga	101	47
El Paso	101	47
Hagerstown	101	47
Los Angeles	101	47
Meridian	101	47
Milwaukee	101	47
Pittsburgh	101	47
Alexandria, La.	100	54
Biloxi - Gulfport - Pascagoula	100	54
Detroit	100	54
Panama City	100	54
Charlotte	99	58
Laredo	99	58
Louisville	99	58
Anniston	98	61
Beaumont - Port Arthur	98	61
Bowling Green	98	61
Burlington - Plattsburgh	98	61
Huntsville - Decatur - Florence	98	61
Lafayette, La.	98	61
Madison	98	61
Norfolk - Portsmouth - Newport News - Hampton	98	61
Salt Lake City	98	61
Binghamton	97	70
Cincinnati	97	70
Columbus - Tupelo	97	70
Flint - Saginaw - Bay City	97	70
Columbus, Ga.	96	74
Glendive	96	74
Idaho Falls - Pocatello	96	74
Jackson, Tenn.	96	74
Memphis	96	74
Raleigh - Durham	96	74
Richmond	96	74
St. Louis	96	74
Seattle - Tacoma	96	74
Tuscaloosa	96	74
Albany, Ga.	95	84
Birmingham	95	84
Cleveland	95	84
Evansville	95	84
Grand Rapids - Kalamazoo - Battle Creek	95	84
McAllen - Brownsville	95	84
Charleston - Huntington	94	90
Greensboro - Winston-Salem - High Point	94	90
Macon	94	90
Roanoke - Lynchburg	94	90
Columbus, Ohio	93	94
Albuquerque	92	95
Elmira	92	95
Erie	92	95
Palm Springs	92	95
Peoria	92	95
Rockford	92	95
Sarasota	92	95
Austin, Tex.	91	102
Bakersfield	91	102
Hartford - New Haven	91	102
Laurel - Hattiesburg	91	102
Syracuse	91	102